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MAINSTREAMING FISHERIES INTO NATIONAL DEVELOPMENT AND POVERTY REDUCTION STRATEGIES: CURRENT SITUATION AND OPPORTUNITIES

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MAINSTREAMING FISHERIES INTO NATIONAL DEVELOPMENT AND POVERTY REDUCTION STRATEGIES: CURRENT SITUATION AND OPPORTUNITIES

by
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PREPARATION OF THIS DOCUMENT

The FAO Fisheries Department is concerned that Governments hardly consider the fisheries sector in the process of policy and strategy formulation for rural development and that fisheries and aquaculture are not seen as relevant in the context of poverty alleviation. Given the continuing importance of poverty alleviation programmes, particularly in Africa, it was decided to study "Why capture fisheries and aquaculture are included in some poverty reduction programmes and not in others". The two main research questions addressed under the study were the following: Is the fisheries sector included in the national Poverty Reduction Strategy Papers (PRSP), the Country Strategy Papers of the European Union (EU) and other National Development Plans? Why is the sector (not) included?

This Circular represents the findings of a desk study carried out between June 2003 and February 2004 by Drs Andy Thorpe of the University of Portsmouth, United Kingdom of Great Britain and Northern Ireland (UK). The author was supported in his work by Dr Chris Reid and Denis Becker of the same university. The study was initiated by Raymon van Anrooy and Rolf Willmann of the FAO Development Planning Service (FIPP) and was only made possible with the valuable financial and technical inputs of the Department for International Development (DFID)-funded Sustainable Fisheries Livelihood Programme (SFLP), and particularly of Benoît Horemans, Richard Coutts and Fabio Pittaluga of this programme. The assistance of Ulf Wijkström, Chief, FIPP and the comments made by various participants at an internal FAO seminar on 20 March 2004 are greatly acknowledged by the author.

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ABSTRACT

The formulation of Poverty Reduction Strategy Papers (PRSPs) is one of the main conditions for concessional lending by the International Monetary Fund (IMF) and the World Bank to developing countries. Nevertheless, while evidence indicates that the fisheries sector can contribute (often markedly at the local level) to improved livelihoods and the achievement of food security in many developing countries, the sector is often neglected in PRSPs.

This Circular first identifies of 129 countries in Africa, Asia, Latin America, economies in transition and Small Island Developing States (SIDS) the significance of the fisheries sector as motor of economic growth or likely poverty refuge. Secondly, it examines the extent to which National Development Plans (NDPs), PRSPs, Country Strategy Papers (CSPs) of the European Union and other donor support programmes have presently incorporated the fisheries sector into such documents. Subsequently, a comparison with data indicating the importance of the sector to the national economy (in terms of generating foreign exchange and/or supporting domestic protein consumption levels) enables us to pinpoint those countries with substantive fisheries sectors, but a correspondingly lower than expected degree of sectoral mainstreaming in NDPs, PRSPs and CSPs, and allows us to identify countries which are currently "punching above their weight" in this respect.

Findings are discussed on a regional basis – regional averages suggesting that the sector has been most effectively mainstreamed in Asia (case of PRSPs, NDPs and the World Bank donor support strategies) – closely followed by the African economies and the SIDS. In contrast Latin America, home to two of the top six global fishing nations (Chile and Peru), scores extremely poorly as far as mainstreaming the fisheries sector in PRSPs and NDPs concerns.

Keywords: fisheries, mainstreaming, Poverty Reduction Strategy Papers, national development plans, Country Assistance Strategies, Country Strategy Papers, employment, trade, consumption, poverty.

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Executive summary

International concern over the widespread nature of food insecurity and poverty in the developing world has increasingly manifested itself in recent years. These concerns have been reflected in the programmes of multilateral donor institutions, most notably the International Monetary Fund (IMF) and the World Bank who, since 1999, have made concessional lending (and eligibility for Heavily Indebted Poor Country [HIPC] debt-relief initiatives conditional upon countries submitting Poverty Reduction Strategy Papers [PRSPs]) prior to funds being released. PRSPs are expected to emerge through a highly participatory and transparent consultation process, prescribing a combination of macroeconomic and sectoral policies consistent with poverty reducing outcomes. Presently (December 2003), fifty countries have completed either a full or interim PRSP, the majority of whom (26) are from Sub-Saharan Africa. The obligation to produce and submit PRSPs has served to strengthen donor coordination around the national policy concerns identified. Country Assistance Strategies (CAS), which describe the World Bank's strategic objectives and lending policy to a country, are now expected to be coincident with nationally produced PRSPs. Similarly the European Union (EU) development policy and aid, as detailed in the respective Country Strategy Papers, is expected to be complementary to, and based upon, the underlying PRSP.

For those other low- and middle-income developing countries which do not qualify for debt relief under the HIPC initiative and/or are unable to take advantage of multilateral concessional lending facilities, national development plans (NDPs) are the order of the day. Countries producing NDPs (or their equivalent) include Mexico and Peru in Latin America, Jamaica and Trinidad and Tobago in the Caribbean, Gabon and Egypt in Africa, and Thailand and the Philippines in Asia. Although poverty reduction may not necessarily be the over-riding policy objective in the case of NDPs, in practice the majority commit themselves to tackling the theme.

Yet, with current projections suggesting a reduction of less than 30 percent (at best) in the numbers living in poverty by 2015 and, with over 60 percent of the poor still likely to be found in the rural sector by 2025 (FAO, 2002), particular attention is now being directed at resolving rural poverty. The keynote address, delivered by the United Nations (UN) Secretary-General Kofi Annan, at the 2003 annual session of the UN Economic and Social Council, for example stressed the need for;

> "… an enabling macroeconomic policy environment that is conducive to poverty eradication and sustainable development in rural areas… according high priority to *incorporating broad integrated rural development strategies designed to reduce poverty into the national planning and policy framework* (Annan, 2003)."

Although the fisheries sector was not explicitly addressed as a distinct part of the rural economy by Annan, regional activities such as the Support to Regional Aquatic Fisheries Management (STREAM) in South-East Asia and the Sustainable Fisheries Livelihoods Programme (SFLP) in West Africa are currently applying various fishery and aquaculture development and management approaches to reduce poverty and tackle local food security issues. Yet, whilst these and similar fisheries projects and programmes have delivered notable welfare-enhancing outcomes, most developing country governments appear to ignore the

potential contribution the sector could make to the achievement of national food security and the reduction of poverty.

This circular seeks to redress this oversight. **First,** it examines the national policy-making process in order to identify potential avenues for advancing the interests of the fisheries sector when determining national budget priorities ("How the sector can be incorporated"). **Second,** it outlines two key reasons why the sector should not perhaps be peripheralized in development thinking and planning – what we term the "growth and equity" argument. The resulting framework allows us to draw up a global typology showing the importance of the sector within developing countries ("Why the sector should be incorporated"). **Third,** it examines the extent to which the sector is currently included in PRSPs, NDPs and donor strategies ("Has the sector been incorporated? – and, if so, to what extent"). **Finally**, it identifies those countries in which the fisheries sector is relatively large in socio-economic terms – but is presently failing to insert itself effectively/substantively in either NDPs and/or poverty reduction strategies, and those countries which are currently "punching above their weight" in this respect.

Section Two of this circular argues that macro-economic policy formulation is the outcome of the interplay between the interests of domestic national stakeholders and international stakeholders, the influence of each depending on particular historic (economic, social and political) circumstances. For much of the developing world, the debt crisis of the 1980s heralded growing external involvement in domestic policy formulation. First through the adoption of structural adjustment programmes – and the accompanying conditionalities – demanded by the IMF and World Bank, and more latterly via the obligation to produce and submit PRSPs before multilateral concessional lending is now approved. The participative process underpinning the preparation of a PRSP cuts across traditional discourse channels and offers new avenues for civil society groupings – including those arraigned in the fisheries sector – to inform the decision-making process, lobbying for the insertion of their desired goals and strategies into the final diagnostic policy document.

In contrast, the opportunity for the fisheries sector to insert itself into the national development dialogue in developing countries that are not dependent upon concessional multilateral lending will be conditioned by its ability to capture/influence key channels of traditional discourse within the policy formulation process. These opportunities are – however – likely to be more muted when the interests of the sector are submerged within a much larger ministry of agriculture and/or environment, fisheries simply being one of a competing number of intraministerial voices when it comes to mainstreaming natural resource strategies into national development planning. Opportunities still exist – it is simply a case of identifying the most optimal entry points for raising the profile of the sector in the strategic planning process.

Having noted the opportunities for sectoral inclusion in policy-making processes, Section Three then makes a case why the sector may merit mainstreaming into PRSPs, NDPs and donor support programmes by highlighting the manner in which fisheries can contribute to poverty reduction strategies. **First,** in terms of its value as a motor of growth. The establishment of 200-mile exclusive economic zones (EEZs) following the 1982 United Nations Conference on the Law of the Sea (UNCLOS) Agreement saw extensive fisheries growth in many developing countries – to the point where developing economies now supply more than 70 percent of total fish for food production (IFPRI, 1997). As fisheries exports now generate more foreign exchange (either through export earnings or licence receipts) than the revenues earned from any other traded food commodity such as rice, cocoa, coffee or tea

(FAO, 2003b), this provides a firm foundation for integrating fisheries into the national policy formulation process for some countries.

Second, in terms of underpinning national nutritional standards, as fish products presently account for 15-16 percent of global animal protein intake (FAO, 2003). The greater the domestic reliance upon fish protein, the greater the opportunity to insert the fisheries sector into national food security strategies (as in many Asian countries, for example). **Third,** the sector stands to benefit from the new poverty-oriented development programmes in those instances/countries where individuals, groups and communities linked to the sector are identified as inherently poor and/or latently vulnerable (as in Viet Nam, for example) – and therefore deserving of support. **Finally,** the potential for poverty-reducing, fisheries-specific, policies grows in line with the numeric size of the sector. The more [poor] fishers there are, the greater the potential for mobilization – and the more difficult it is for policy-makers to ignore such voices in the participatory dialogues that are increasingly informing national development processes. These four measures are then applied to identify the relative importance of the sector across 129 developing countries.

Section Four analyses a total of 281 of the most recent PRSPs, NDPs and donor support documents to ascertain whether the sector has been incorporated (and, if so, to what extent) in national development discourses. We apply a content analysis methodology derived from Oksanen and Mersmann's (2002) study of forestry sector inclusion in Sub-Saharan African poverty reduction strategies which evaluates inclusion against four criteria (fisheries issues, causal linkages, responses and processes) on a discrete four-point scale. Findings are discussed on a regional basis – regional averages suggesting that the sector has been most effectively mainstreamed in Asia (case of PRSPs, NDPs and World Bank donor support strategies) – closely followed by the African economies and the Small Island Developing States (SIDS). In contrast, Latin America, home to two of the top six global fishing nations (Chile and Peru), scores extremely poorly on the PRSP/NDP front.

ABBREVIATIONS AND ACRONYMS

ADB	Asian Development Bank
ALCOM	Aquaculture for Local Communities Programme (FAO)
CAS	Country Assistance Strategies
CESP	Country Environment Strategy Papers
CSP	Country Strategy Papers
EC	European Community
EU	European Union
CCRF	Code of Conduct for Responsible Fisheries
CDF	Comprehensive Development Framework
DFID	Department for International Development (United Kingdom)
FAO	Food and Agriculture Organization of the United Nations
FIP	Fishery Policy and Planning Division (FAO)
FIPP	Development Planning Service (FAO)
GDP	Gross Domestic Product
HIPC	Heavily Indebted Poor Countries
IMF	International Monetary Fund
NDP	National Development Plan
NEAP	National Environmental Action Plans
PRSP	Poverty Reduction Strategy Paper
SAPA	Sustainable Aquaculture for Poverty Alleviation
SFLP	Sustainable Fisheries Livelihoods Programme (FAO)
SIDS	Small Island Developing States
STREAM	Support to Regional Aquatic Resource Management (NACA)
UN	United Nations
UNCLOS	United Nations Conference on the Law of the Sea
UNDP	United Nations Development Programme
WFP	World Food Programme

1. INTRODUCTION

International concern over the widespread nature of food insecurity in the developing world has increasingly manifested itself in recent years. The 1996 World Food Summit (WFS) pledged to halve the number of undernourished individuals to around 410 million by 2015, a commitment encapsulated within The Millennium Development Goals (MDG), adopted by the UN in September 2000 – which also promised a similar reduction in the number of individuals who subsisted on an income of less than US$ 1 a day (then estimated at 1 134 million – around 25 percent of the population of the developing world). These concerns have been reflected in the programmes of multilateral donor institutions, most notably the IMF and World Bank who, since 1999, have made all concessional lending[1] (and eligibility for HIPC debt-relief initiatives) conditional upon countries submitting Poverty Reduction Strategy Papers (PRSPs) prior to funds being released. These Papers not only oblige countries to encapsulate and quantify the multidimensional nature of domestic poverty, but are also expected to advance comprehensive macroeconomic, structural and social policies consistent with poverty reducing outcomes. Significantly too, PRSPs are posited to emerge from a highly participatory and transparent consultation process, thereby reducing the likelihood of policy slippage over time by ensuring that the ensuing macro – and sectoral development strategies are country, rather than donor, driven.

Despite this emphasis on "national ownership"of economic reform agendas, doubts are already being voiced as to whether the revised development strategies resulting will be sufficient to meet the WFS nutritional target by 2030, let alone 2015[2]. Equally, population growth seems likely to frustrate the MDG poverty reduction objective, with current projections suggesting a reduction of less than 30 percent – at best – in the numbers living in poverty by 2015 (FAO, 2002:2; World Bank, 2001:39).

These inquietudes have served to focus particular attention on the rural sector, where more than seventy percent of the developing country poor live and work[3]. Consequently, the UN Economic and Social Council (ECOSOC), the second highest deliberative body in the UN hierarchy, chose to orientate the opening discussions at its 2003 annual session (30 June to 25 July) around the theme of "Promoting an Integrated Approach to Rural Development in Developing Countries for Poverty Eradication and Sustainable Development". A keynote Report by the Secretary-General, Kofi Annan, on the theme stressed, *inter alia*, the need to create;

> "an enabling macroeconomic policy environment that is conducive to poverty eradication and sustainable development in rural areas by according high priority to *incorporating broad integrated rural development strategies designed to reduce poverty into the national planning and policy framework* (Annan, 2003:18, the italics are ours)."

and;

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[1] Concessional lending refers to loans granted at below market-related rates. Of the six loan instruments currently deployed by the IMF, for example, just one – the Poverty Reduction and Growth Facility (which funds PRSP borrowing) – offers concessional rates (presently 0.5 percent per annum).

[2] Jacques Diouf, Director-General of FAO, goes so far as to suggest that, on current trends, the goal of halving the number of hungry will not be met until 2050 (ECOSOC Press Release 6054).

[3] IFAD (2001) note that, on current trends, despite the drift from country to city, over 60 percent of the poor will still be found in rural areas by 2025.

> "Recognizing that poverty affects a substantial proportion of rural households, national and international poverty reduction strategies need to target rural areas and households more systematically by integrating poverty eradication and food strategy objectives more firmly into Poverty Reduction Strategy Papers …(Annan, 2003:21)."

Although the fisheries sector[4] was not explicitly addressed as a distinct element within the rural economy by the Annan Report, the lead UN agency charged with supporting world-wide rural development – FAO – atones for this within its 2000–2015 Strategic Framework. A specific Major medium term Programme of the Framework (Programme 2.3) is designed to facilitate and ensure the long-term sustainable development and utilization of the world's fisheries and aquaculture, and embraces ongoing efforts to eradicate food insecurity and rural poverty in coastal areas and main watersheds (FAO, 2002:106ff). Specific regional activities such as the Support to Regional Aquatic Fisheries Management (STREAM) in South-East Asia, the Bay of Bengal Programme, the Sustainable Fisheries Livelihoods Programme (SFLP) in West Africa and the Aquatic Resource Management for Local Communities Programme (ALCOM) in East Africa, and the Network of Small-Scale Rural Aquaculture Producers (Red–ARPE) in Latin America are currently addressing poverty alleviation and food security issues by applying various fishery and aquaculture development and management approaches. Yet, whilst these and other more locally-based projects and programmes have delivered notable welfare-enhancing outcomes, most governments in developing countries generally do not regard the fisheries sector as one of the sectors that could assist in the achievement of national food security and the reduction of poverty.

It is the task of this study then to redress this oversight. **First,** we examine the national policy–making process in order to identify potential avenues for advancing the interests of the fisheries sector when determining national budget priorities ("How the sector can be incorporated"). In particular, we examine how the major multilateral organizations" demand for the submission of participatory PRSPs from certain low-income countries before releasing development funds impinges upon the national decision-making and policy formulation process. **Second,** in order to apprise governments of the necessity of (and benefits from) incorporating the fisheries sector more fully into poverty reduction strategies and NDPs (NDPs) we commence by outlining two key reasons why the sector should not perhaps be peripheralized in development thinking and planning – what we term the "growth and equity" argument. The resulting framework allows us to draw up a global typology showing the importance of the sector within developing countries ("Why the sector should be incorporated"). **Third,** we examine the extent to which the sector is currently included in PRSPs, NDPs and donor strategies, providing concrete examples of how, to date, the fisheries sector has been integrated into such documents in an effort to identify best practices ("Has the sector been incorporated? – and, if so, to what extent"). **Finally**, we compare said outcomes with the outcomes predicted by the analytical framework outlined in the preceding section of this report in order to identify those countries in which the fisheries sector is relatively large in socio-economic terms – but is presently failing to insert itself effectively/substantively in either NDPs and/or poverty reduction strategies, and those countries which are currently "punching above their weight" in this respect.

[4] Unless otherwise stated, the term "fisheries sector" includes capture fisheries, aquaculture and connected activities in fish processing and marketing.

2. THE PLANNING PROCESS: UNDERSTANDING AVENUES FOR INCORPORATING THE FISHERIES SECTOR IN NATIONAL DEVELOPMENT PLANS (NDPS)

Macro-economic policy formulation is the outcome of the interplay between the interests of domestic national stakeholders and international stakeholders, the influence of each depending on particular historic (economic, social, and political) circumstances. In Europe, for example, the growing tendency towards economic integration has been predicated by the progressive transferral of decision-making powers to the European Central Bank, the European Parliament and the European Commission, a process that has arguably diminished the scope for domestic stakeholders to influence national policy formulation. For much of the developing world, the debt crisis of the 1980s also heralded growing external involvement in domestic policy formulation, as multilateral agencies demanded the recipient governments remove perceived local obstacles to growth so as to enable the country to grow out of debt. The introduction of Structural Adjustment loans by the World Bank (1979) and the creation of the Structural Adjustment (1986) and Extended Structural Adjustment Facility (1987) by the IMF in response to the crisis, represented a move away from short-term (IMF), project-based lending (World Bank) towards medium-term programme based lending. It also presaged the growing homogenization of external response to perceived domestic policy failings. Now, multilateral borrowing was invariably tied to the introduction of neo-liberal policy measures to restore macroeconomic stability in the short-term, with supply-side reforms (trade and financial liberalization, price and labour market deregulation, and privatization) programmed to follow. By the end of the 1980s, the granting of structural adjustment loans were substantive activities of both the Bank and the Fund[5].

There was recognition too within multilateral circles at the time of the importance of national "ownership" of such programmes, a number of authors noting the serious difficulties that could/did arise if the implemented strategy was perceived to be too donor-driven (McCleary, 1991; Kahler, 1992; Johnson and Wasty, 1993, Husain, 1994:19; Killick, 1995:169). Nevertheless, the principal focus of such externally-supported neo-liberal strategies remained the restoration of growth, buttressed by the belief of a unitary growth elasticity for the bottom quintile of the income distribution (Dollar and Kraay, 2001). While strategies implemented in the early 1990s had introduced social safety nets to mitigate possible short-term effects of adjustment on the poor, there was little acknowledgement that neo-liberal programmes may have enduring negative impacts on the access of the poor to both assets and markets (Evans, 2000).

Unfortunately, and perhaps due to these failings, the evolving neo-liberal strategy failed to make a "real dent" (Birdsall and Londoño, 1997:36) in the magnitude of poverty in either Latin America or Sub-Saharan Africa. The seemingly intractable nature of poverty now prompted governments attending the 1995 World Summit for Social Development to commit themselves to developing more explicitly pro-poor policy frameworks within the context of NDPs (DFID/EC/UNDP, 2002:14). It coincided too with the World Bank also beginning to shift its position somewhat. The publication of a new mission statement (*Embracing the Future*) espoused the need for greater local involvement in the design, preparation and supervision of Bank activities (Oxfam, 1995:205) and led the institution to more explicitly

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[5] Structural adjustment lending accounted for 25 percent of all Bank lending (over 50 percent of lending to heavily indebted countries) by the end of the decade, with loans under the Extended Structural Adjustment Facility having become the second most important activity of the IMF by the mid-1990s (Corbo and Fischer, 1992:7; Thorpe, 2002a:15).

consider how to both eliminate discrimination against, and/or open up new opportunities for, the poor in inegalitarian societies.

These deliberations were aided by a major Bank research project – *Voices of the Poor* – which collated information from participatory poverty assessments undertaken by the Bank in fifty countries during the 1990s, supplemented by fieldwork in twenty-three countries in early 1999[6]. The project was influential on two counts. First, it became an integral input into the 2000/1 World Development Report *Attacking Poverty*, a Report that advocated the need to promote opportunity, facilitate empowerment and enhance security if poverty was to be tackled effectively. Second, it undoubtedly played a part in persuading the World Bank and the IMF at their September 1999 Annual Meetings to accept that country-owned poverty reduction strategies should form the basis for all future Bank and IMF concessional lending, said strategies also guiding the use of resources freed-up under the enhanced HIPC Initiative[7] (World Bank, 2000a:3). To this end, beneficiaries of multilateral concessional largesse (either through the IMF Poverty Reduction and Growth Facility (PRGF) or via the Bank"s International Development Association (IDA)) are expected to operationalize the principles espoused in the Bank's Comprehensive Development Framework (CDF)[8] into practical action plans in the shape of Poverty Reduction Strategy Papers (PRSPs).

Box 1
Core principles underpinning the formulation of PRSPs

Country-driven Involving broad-Based Participation by Civil Society and the Private Sector in all Operational Steps.

Results-oriented Focussing on Outcomes that would Benefit the Poor

Comprehensive In terms of recognising the Multidimensional Nature of Poverty.

Partnership-oriented Involving the Co-ordinated Participation of Development Partners (Bilateral, Multilateral)

Long-term

Source: www.worldbank.org/poverty/strategies/overview.htm

[6] The research enabled the poor to articulate their most pressing problems and priorities, discuss changes in gender and social relations, and detail how they interacted with public, market and civil society institutions. The consultation gathered together the voices of 60,000 men and women across 60 countries, culminating with a final Global Synthesis Workshop held in Washington D.C in September 1999 (http://www.worldbank.org/poverty/voices).

[7] The Heavily Indebted Poor Countries (HIPC) Initiative was proposed by the World Bank and IMF and agreed by governments around the world in late 1996. It represented the first comprehensive debt-reduction strategy targeted at the world's poorest, most heavily indebted countries, and placed debt relief within an overall framework of poverty reduction. A major review identifying the Initiative's strengths and failings in 1999 produced an enhanced Initiative, described by its proponents as being 'deeper, broader and faster' (http://www.worldbank.org/hipc/).

[8] The CDF emphasises the interdependent nature of development – social, structural, human, governance, environmental, economic, and financial – and advances the need for policy-making processes that seek to balance these different elements.

While these papers, like the CDF, have certain inviolable core principles (see Box 1), their presentational format is becoming increasingly standardized thanks to the provision of a "suggestive" Sourcebook , and involves;

(i) *A description of the participatory process used to draw up the PRSP* (format, frequency and location of consultations and the participants involved, a summary of the main issues raised, an account of how the consultations impacted upon the final document and the role of civil society in both implementing and monitoring the strategy).

(ii) *Comprehensive poverty diagnostics* (describing the nature, extent and location of poverty).

(iii) *Clearly presented and costed macroeconomic, structural and social policy priorities* (the strategy necessary for delivering poverty-reducing outcomes and their costing)

(iv) *Appropriate targets, indicators, and monitoring systems* (including medium – and long-term poverty reduction goals and the stipulated annual targets seen as necessary to reach these eventual goals – so as to enable an effective ongoing monitoring and evaluation of the PRSP strategy)

Despite this growing standardization of both the process and presentational style, the contents of national PRSPs can vary markedly as;

"Developing countries need to prepare their own mix of policies to reduce poverty, reflecting national priorities and local realities. Choices will depend on the economic, socio-political, structural, and cultural context of individual countries – indeed individual communities. ... *priorities will have to be set in individual cases based on resources and what is institutionally feasible* (World Bank, 2000:7, the italics are ours)."

The relative novelty of the PRSP process, allied to the need for urgency to prevent delays for countries intent on seeking debt relief under the HIPC Initiative, saw provision made for the formulation of Interim PRSPs. Interim PRSPs detail the country's current poverty reduction strategy and set out a road-map and accompanying timeline (generally twelve months – if longer, annual progress reports on the preparation process are required by the multilateral institutions) for the completion of a full PRSP. To date (end December 2003), 37 countries have completed a full PRSP with a further 13 having submitted an Interim PRSP. Although country-driven, multilateral endorsement is necessary[9] before either; (i) HIPC countries can reach a decision/completion point, (ii) access to the IMF's PRGF is approved and/or, (iii) IDA concessional funds from the World Bank are forthcoming. While transparency of the process is assured through the web publication of the resulting Interim and/or Full PRSPs and the accompanying JSAs on the World Bank and IMF websites, concern has been expressed in some quarters about the way the process is evolving (Box 2).

[9] Multilateral endorsement takes the form of a Joint Staff Assessment (JSA) by the IMF/Bank to their respective Boards indicating that the completed PRSP provides a sound basis for debt relief and/or fund release.

Box 2
The PRSP process: concerns about its evolution

Participation?
* Is it realistic to talk of full "stakeholder participation" when certain actors (notably the IMF and World Bank) presently hold potentially powerful positions within the policy-making process?

* Is the IMF (in particular) prepared to concede to a more open discussion of fiscal policy (especially in terms of elaborating a Medium Term Expenditure Framework) expenditure and financing?

Country-driven?
*Will the donor community adopt a "hands off" approach to policy formulation, rather than succumb to the temptation to be heavily prescriptive in such arenas?

(a) Does the existence of donor timelines and bureaucratic processes inhibit the development of a nationally owned PRSP?

(b) Can multilateral conditionalities be devised in a way that avoids undermining local ownership and accountability, whilst guaranteeing flexibility in the management of the policy process?

Adapted from Norton and Foster (2001:19)

That said, it is undeniable that the formulation of PRSPs has served to strengthen donor coordination around the policy concerns identified, through participatory processes (however flawed), by the host government. Country Assistance Strategies (CAS), which describe the World Bank's strategic objectives and lending policy to a country, are now expected to both temporally follow, and be based on, nationally produced PRSPs. Similarly EU development policy and aid, as advanced in the respective Country Strategy Papers, is expected to be complementary to, and based upon, the underlying PRSP (c.f. the summaries of the Bolivian and Nicaraguan Country Strategy Papers at http://europa.eu.int/comm/external_relations/). Other bilateral donors are also increasingly implementing aid strategies consonant with nationally-devised PRSPs; Dfid (UK) is "committed to building development partnerships based on a shared agenda set by a credible poverty reduction strategy (Dfid, 2002:15)", the German Federal Republic "in pursuing its commitment to the United Nation's goal of halving extreme poverty by 2015, supports the implementation of Poverty Reduction Strategies as a promising short to medium-term means of jointly achieving this objective" (GTZ, 2002); while USAID is directing funds under its Developing Agriculture and Reducing Poverty programme to those African countries whose governments are most committed to increasing growth and reducing poverty (USAID, 2003:3). PRSPs offer a favourable channel then for coordinating and channelling donor support – and for this reason have come to overshadow or supplant NDPs in many developing countries.

Nevertheless, there are a group of low- and middle-income developing countries – those not burdened with excessively onerous levels of debt so as to qualify for relief under the HIPC Initiative, nor need (or perhaps are able) to borrow from the multilateral institutions at

concessional rates[10] – who are not obliged to produce PRSPs (what we shall term the PRSP – exempt countries). These include countries such as Mexico and Peru in Latin America, Jamaica and Trinidad and Tobago in the Caribbean, Gabon and Egypt in Africa, and Thailand and the Philippines in Asia. Such countries are less influenced by international stakeholders when drawing up development strategies and, as a consequence, the ensuing NDPs and programmes are more a reflection of domestic stakeholder pressures and influence, exercised through conventional (local) channels of policy discourse. Equally, poverty reduction may not necessarily be the over-riding policy objective – the Uruguayan agenda announced in President Batlle's inaugural speech in March 2000, for example, highlighted four priority areas (implementation of structural reforms to increase competitiveness, modernization and reform of the state, human resource development and greater integration with Mercosur) rather than any explicit commitment to tackle inequality and poverty (http://europa.eu.int/comm/external_relations/uruguay/csp/02_06en.pdf). As – or perhaps because – such national development strategies are also more heterogeneous in both content and style, there is a marked absence of direct comparative work to date which synthesizes the extent of stakeholder participation in, and the substance of, such plans in the way FAO and others have done with regard to PRSP-implementing countries (FAO, 2002; Foster and Macintosh-Walker, 2001; Bertelsen and Jensen, 2002; Robb, 2000).

In such "PRSP-exempt" countries the opportunity for the fisheries sector's insertion into national development planning is conditioned by its ability to capture/influence key channels of traditional discourse within the policy formulation process. These opportunities are likely to be more muted when the interests of the sector are submerged within a much larger ministry of agriculture and/or environment, fisheries simply being one of a competing number of intra-ministerial voices when it comes to mainstreaming natural resource strategies into national development planning. In the case of Brazil, for example, an earlier FAO Fisheries Circular by Sugunan (1997:75) noted how the *Instituto Brasiliero do Medio Ambiente* (IBAMA), the national agency entrusted with responsibility for both natural resource management (including fisheries) and environment conservation in 1989, was singularly ill-equipped to represent the sector's interests, counting on just four professionals dealing with aquaculture at HQ – and just one person responsible for aquaculture and fisheries in each state capital[11]. Equally, whilst the fisheries sector has grown to become the second largest contributor to exports (after coffee) in Nicaragua, the downgrading of the *Administración Nacional de Pesca y Acuicultura* (Adpesca, formerly Inpesca-Medepesca) into one of four dependencies within the *Ministerio de Fomento, Industria y Comercio* (Mific) and has a concomitant reduction in sectoral support – inadequate staffing levels and only very limited government extension services available (AdPESCA, 2003). Opportunities to influence the policy-making process are not obdurate, however, and can wax and wane as circumstances change. New institutional arrangements engendered by (or contributing to) the formulation of a new development strategy can provide opportunities for a more pronounced role for the sector in the policy formulation process for example. In Mexico, the new economic strategy based on resource extraction and the development of related industries introduced by the López Portillo regime (1976–82) saw the Fisheries Sub-Secretariat successively upgraded to a full department (1976) and thence a Ministry (1982), the

[10] The World Bank concessional window – the IDA – for example is only available to countries that are unable (for reasons of creditworthiness) to borrow from the IBRD and have a 2002 per capita income of under US$ 875. Presently 81 countries are eligible to borrow from the IDA.

[11] In effect, fisheries management (and exploitation) was partially privatised, fisheries laws requiring the owners and concessionaries of "impounding structures" (generally dams) to take appropriate measures so as to preserve and protect aquatic fauna.

formulation of a First National Plan for Fishing Development (197–82), and a doubling of the sector's proposed investment budget to US$ 1.3 billion (Ibarra *et al.*, 2000:520/1). Equally, in Argentina, the adoption of a neo-liberal development programme by the Menem government in the 1990s which strongly supported export growth was a major contributor to the growth of the national fleet and led to a commensurate increase in the sector's influence on the development discourse (Thorpe, Ibarra and Reid, 2000). Opportunities exist – it is simply a case of identifying the most optimal entry points for raising the profile of the sector in the strategic planning process.

In contrast, the participative process involved in preparing a PRSP cuts across traditional discourse channels and, by offering civil society organizations a greater voice in informing the decision-making process, means that "PRSP countries" offer potentially greater opportunities for the insertion of desired goals and strategies into the final diagnostic policy document. Attempts have already been made to examine how gender (Zuckerman, 2002; ECOSOC, 2003), sustainability (Difd, 2000; Bojö and Reddy, 2002; Dfid/EC/UNDP/World Bank, 2002) HIV/Aids (World Bank, 2001), and forestry (Oksanen and Mersmann. 2002) can be better integrated into national poverty reduction strategies, with Foster (2000:15/6) resolute in insisting that sectoral programmes should be "nested" within the overall development strategy[12]. Unfortunately, to date, the only fisheries-related research on the theme – originating from the FAO/Dfid/SFLP-funded regional poverty alleviation programme for small-scale fisheries in West Africa – suggests an opportunity forgone rather than an opportunity seized. Although opportunities were available – the sector generally being represented at most consultative levels (task force, thematic working group, community level) in the 11 sampled countries – participation did not translate effectively into policy and the final report concluded;

"The main outcome of this clearly showed that small-scale fisheries are rarely taken into account in PRSPs formulation (FAO/Dfid/SFLP, 2002:ii)."

Such a finding can suggest one of two things. First, the sector is of peripheral importance in the macro-economic decision-making field – and so may be discounted when formulating national poverty reduction strategies. Second, the sector **is** important, but current interaction with – and/or articulation of the desired sectoral objectives within – the participative process is ineffectual. The next section of this report therefore makes a case as to why the fisheries sector should not perhaps be peripheralized in development thinking and planning – and then derives a framework for identifying the relative importance of the fisheries sector in different countries from a growth and/or an equity perspective.

3. GROWTH AND EQUITY: GROUNDS FOR INSERTING THE SECTOR IN PRSPS AND NDPS

We contend that the sector can have a particularly important role to play in the national development process on two counts. **First,** when it either contributes – or could potentially contribute – to underlying growth processes in a substantive manner **(what we choose to term "the growth basis for fisheries insertion into national development processes").** The exponential growth in the exploitation of anchovy stocks off Peru from the late 1950s

[12] He suggests that; (i) government develops an overall strategy of vision for sustainable development, (ii) cross-cutting institutional reforms are put in place to provide the necessary supporting framework, (iii) the budgetary process assigns finances between the competing priorities, and (iv) sector wide approaches (SWAPS) define a sectoral policy consistent with government priorities and assigned resources.

onwards, for example, saw the sector accorded a central role in 1971–76 National Development Plan (Ibarra, Reid and Thorpe, 2000:510). Equally, a belated recognition of the value of squid stocks off the Falkland Islands has converted an ailing colonial outpost into a relatively prosperous fishing-fuelled domain since the late 1980s, with a licensing regime depositing some £ 27.5 million annually into the island's coffers (Economist, 30/3/2002; World Fishing, 2001). **Second,** in those instances where a substantial number and/or substantive percentage of a countries fisheries-dependent population are enmeshed in poverty **(what we choose to term "the equity basis for fisheries insertion into national development processes").** The STREAM initiative (2000:23), for example, suggests that 88 percent of the very low income households encountered in Tay Ninh province in Viet Nam in 1999 were linked to the fisheries sector (whereas only 44 percent of high income households were similarly linked). Conversely, however, Mkenda (2000:10) suggests that, in Zanzibar at least, fishing households are not the "poorest of the poor" – with "only" 43 percent of such households falling below an expenditure-based poverty line, in contrast to 60 percent of subsistence and cash-cropping peasants. Kotikula (2003) reaches similar conclusions regarding Thailand; finding the poverty rate (at 9.8 percent) within fishing communities to be two and a half times less than in the rural north-east. Examining each of these rationales for insertion in more detail;

3.1 The "Growth Basis" for fisheries insertion into national development processes

"In terms of policy challenges, strong growth was recognized as key to poverty reduction (IMF/World Bank, 2002:9)".

National development strategies across the world are – and have always been – predicated on the basis that adoption of the proposed strategies will have a positive impact on the economic growth rate and thereby contribute to a sustained elevation in the aggregate welfare of domestic citizens (See Box 3).

There would appear, however, to be no unique growth blue print, with extensive empirical research identifying a substantial number of factors which have been found to be partially correlated to economic growth rates (Sala-I-Martin, 1997:178; Easterly, 2001). These factors include; foreign aid (Burnside and Dollar, 1997), openness to trade (Sachs and Warner, 1995) and capital flows (Rappaport, 2000), school enrolment rates (Barro, 1991), population growth rates (Solow, 1956), technological innovation (Scherer, 1999), democracy (Barro, 1996) and property rights (de Soto, 2001; Goldsmith, 1995), social capital (Helliwell and Puttnam, 1995), and corruption (Mauro, 1995). For this reason, as we have already noted, the contents of contemporary PRSPs differ markedly, reflecting local realities.

Nevertheless, a central component of the neo-liberal development strategy espoused by the main multilateral institutions during the 1980s and early 1990s, and one which has carried over into many of the poverty reduction strategies of the early years of the twenty-first century, was an emphasis on export-led growth. Drawing its inspiration from neo-classical trade theory (Corden, 1993; Krueger, 1982), the new development paradigm argued for exchange rate and trade regime liberalization (tariff and export subsidy reductions), with unambiguous welfare gains expected as resources were allocated more efficiently. As exports and imports adjusted to reflect international comparative advantage, developed and developing countries alike had the opportunity to harness trade as "an engine of growth".

Box 3
Examples of national development strategies and the growth objective

"With many roots and multidimensional characteristics, all routes matter for the poverty reduction strategy… The first set of policies would accelerate and expand the scope for *pro-poor economic growth*… (Bangladesh: A National Strategy for Economic Growth, Poverty Reduction and Social Development, March 2003, p.8)."

"Given the still-lagging state of our economy, substantial increases in incomes, in the sense of purchasing power, will be essential to permit our citizens to realize their talents and aspirations. For that reason, promotion of economic growth has to play a central role in the Strategy (Guyana: National Development Strategy 1997–2007, Chap.2.p.1)."

"In our development strategy… agriculture would be given priority. In the context of that strategy, our main concern is to ensure that the peasantry shall be the first to benefit… (Partido Africano da Independencia da Guine e Cabo Verde (PAIGC), 1977:25)."

"In the period 2001–7, we shall establish the basis for a productive model capable of generating sustainable growth, promoting the diversification of production and achieving international competitiveness in the context of macroeconomic stability (Venezuela: Plan de Desarrollo Económico y Social de la Nación 2001–2007, p.16)."

"The people of East Timor have many expectations, but these focus strongly on two over-riding development goals; …(b) to promote economic growth that is equitable and sustainable… (East Timor: First National Development Plan, 2002, p.1)."

"The restoration of economic growth is a fundamental factor for resolving the problems of employment and poverty (Colombia: Plan Nacional de Desarrollo 2002–06: Hacia Un Estado Comunitario, Chap.2. p.71)."

Capital scarcity within much of the developing world however ensured that just two principal developmental paths existed – a physical (natural) resource, and a human resource-based path – though the two are not mutually exclusive. China is a good exemplar of the latter. It has successfully used its immense pool of low-cost labour to make increasing inroads into the labour-intensive, manufacturing sphere of global trade, much to the consternation of other East Asian economies who had previously dominated the market sector (The Economist, 17/3/2001). Chile elected to follow the alternative route; natural resource exports (copper, agriculture, forestry and fish products) and processed derivatives thereof dominating a dynamic export portfolio that accounted for over 40 percent of growth in GNP between 1990 and 2000 (UNDP, 2001).

For those countries not fortunate to count upon depletable natural resources in the shape of copper, oil, natural gas, diamonds and the like, agricultural exports have been the cornerstone of neo-liberal trade promotion strategies (Thrupp, Bergeron and Waters, 1995; Quiroz, 2000; Wobst, 2001; Takane, 2002). The importance of agriculture to the growth process is not limited to its capability to enhance export earnings however, especially given its key

contribution to domestic employment and consumption in many developing countries. As FAO (2002:29) note; "all PRSPs recognize the important role that agriculture and rural development can play in terms of broad based economic growth." This is reflected in international donor support, most notably with regard to USAID, which has doubled funding extended under its Economic Growth, Agriculture and Trade (EGAT) pillar in Latin America[13], and launched a *Cut Hunger in Africa* initiative in 2003 – along with a commensurate 25 percent increase in programme funding – following the realization that the agricultural sector is "the most cost-effective engine of growth" for the continent (USAID, 2003:3).

Other renewable resource sectors (forestry and fisheries) have generally been accorded much less attention than agriculture in either national development strategies or donor support programmes as their respective contributions to export earnings, domestic employment and domestic consumption are relatively smaller – albeit with some exceptions. In Latvia, for example, the forestry sector accounts for 10–15 percent of GDP and 4.3 percent of total employment, whilst 12 percent of Icelandic GDP and around 70 percent of export earnings is derived from fisheries (Tikkanen *et al.,* 2002:36; FCO, 2003). While the fisheries sector may not be the principal motor of growth in many countries it can, nevertheless, still play an important ancillary role in enhancing growth rates over time through;

(i) The exploitation of underexploited marine and inland stocks, although this avenue has been progressively closed over time.

(ii) The initiation and/or continued development of aquaculture and mariculture activities, the two fastest growing food export activities in the world in value terms (IFPRI, 1997).

(iii) Improvements in value-added within the sector. This could be through the provision of new infrastructure (landing facilities, processing, curing and canning installations) in order to reduce domestic wastage rates, and/or strategies designed to exploit opportunities in the more profitable export market. In Senegal, for example, the Stradex programme proposes to develop new seafood export products, to improve the quality of existing ones, to create new types of ready-to-use products for export markets, and to introduce quality labels and, by so reinforcing Senegal's export market position, augment the sector's earnings (Agro-Ind, 2002).

(iv) Integrating the sector more closely – where warranted – into tourism and coastal-zone management programmes so as to derive benefits through eco-tourism and marine park initiatives, sport fishing and the like (FAO, 1996:10).

While this importance can be measured in a number of ways (sectoral contribution to GDP, generation of resource rents, net or gross export earnings, licence fee receipts, inward investment into the sector, the role of fisheries in contributing to food security etc.) **this paper selects two criteria for illustrating the current significance of the sector in growth terms. First**, given the scarce capital and foreign-exchange constraints encountered by many developing countries, we highlight the standing of the sector as a generator of foreign

[13] The other three USAID pillars are: Global Health (GH), Democracy, Conflict and Humanitarian Assistance (DCHA), and the Global Development Alliance (GDA).

exchange[14], arguing that the larger is its contribution, the more likely is – or the greater the opportunities are for – its insertion into national policy formulation processes. Although gross export earnings affords no great insights into the resource rent generating – and hence efficiency – capacity of a particular national fishery, it does provide both a (rough) indicator of the sector's capital accumulating capacity and a proxy for the presence of an important pressure group who can lobby for greater inclusion of sectoral interests in national policy documents. Equally, we wish to stress that using exports to provide a snapshot illustrating the current significance of the sector from a developmental perspective should not be construed as providing any justification for the adoption of policy measures designed to further expand exports[15].

Second, given that the sector plays a crucial role in underpinning nutritional standards and/or food security in many countries – providing 15–16 percent of global animal protein intake (FAO, 2003:5) – we also highlight national reliance upon the sector for provision of animal protein needs. The greater the reliance upon fish protein, the greater the likelihood that national development strategies will reflect this[16], embracing policies designed to either safeguard this protein source[17] and/or reduce dependence thereon – either way such a dependence affords opportunities for influencing the policy-making process.

Growth is not necessarily an end in itself however but, as the increasing distributional re-orientation of national development strategies in recent years shows, can also impact upon poverty. Although there is widespread recognition that growth can be beneficial to the poor, there is marked disagreement as to the extent to which such benefits "trickle-down" (Sharma, 1997; Foster and Székely, 2001; Norton 2002). While Dollar and Kraay (2001) have uncovered a unitary growth elasticity -- a one percent increase in growth translates into an equivalent increase in income – for the bottom quintile of the income distribution, scepticism over the extent of "trickle-down" has led to demands for pro-poor growth (see Stiglitz, 2002; and cited Bangladeshi strategy in Box 3 for example). FAO (2000:5) note, for example, that in the fisheries context there is only some "anecdotal evidence" suggesting national economic growth trickles down to fishing communities. Indeed, it is quite possible that fisheries induced growth, as in the case of the factory/freezer vessel driven expansion of the Argentine hake fishery during the 1990s, delivers limited benefits to local (artisanal) fishing communities (Thorpe, Ibarra and Reid, 2000:1689). This form of exclusionary growth is not overly contentious in instances where excluded local fishing communities are relatively wealthy. It is, however, when such artisanal fishing communities are relatively impoverished – and can lead to demands for a more pro-poor fisheries growth. A case in point is Chile, where CONAPACH have argued that quota allocations in the country's main pelagic and demersal fisheries should primarily accommodate the social and cultural considerations of

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[14] FAO (2003b) have, in fact, highlighted that "net export revenues from fish exports earned by developing countries reached US$ 17.7 billion in 2001, an amount larger than for any other traded food commodity such as rice, cocoa, tea or coffee."

[15] Indeed, as FAO (2003a:13) clearly caution; "The big problem in fishing is that wealth and revenue tend to sow the seeds of their own destruction through over-exploitation".

[16] In Viet Nam, for example, where fish provides 37 percent of daily animal protein intake, the government announced a Sustainable Aquaculture for Poverty Alleviation (SAPA) Strategy and Implementation Programme as a part of a wider Hunger Eradication and Poverty Reduction (HEPR) Programme (Govt Viet Nam, 2001).

[17] This protein source could have internal or external origins. In the case of the former (fish protein extracted from internal – inland and marine – water-bodies), safeguards could be introduced to regulate domestic catch rates so as to avoid the over-exploitation of the resource base. In the case of the latter (fish proteins imported to satiate internal demand), access to such proteins could be assured through the signing of fisheries agreements, as in the case of the EU, for example. Providing alternative sourcing options exist, such agreements may well have a deleterious impact upon fish stocks in the supplying country's waters however (ADE, 2002:61).

the artisanal fishing community, rather than be driven by an analysis of historic catch by sector (2002:16). The issue of poverty within fisheries communities can also provide an equally compelling reason as to why the sector should be accorded a higher profile in the national development process.

3.2 The "Equity Basis" for fisheries insertion into national development processes

Poverty, or rather, poverty reduction strategies, are increasingly being accorded a centrality in the development planning process as we have indicated above (Section 2). This growing preoccupation with poverty has also been matched by a greater diagnostic emphasis on the extent, nature and location of pockets of poverty. The Benin PRSP 2003–5, for example, uses a series of household surveys to show that while the extent of monetary poverty; (i) fell in urban areas from 28.5 percent to 23.3 percent between 1996 and 1999, it rose in rural areas from 25.2 percent to 33 percent (1994/5 to 1999/2000), (ii) is highest in the northern rural departments of Borgou, Alibori, Atacora and Donga, urban pockets of poverty are to be found in the departments of Couffo, Atacora, and Ouémé, and (iii) is more severe for those women who are poor, more males are poor in absolute terms (PRSP-Benin, 2002:12ff). The document, as do most PRSPs completed to date (FAO, 2002a:13), also recognizes the multidimensional nature of poverty, elaborating a non-monetary poverty index based on five social indicators[18]. The ensuing computations suggested that the incidence of non-monetary poverty climbed from 43.4 percent to 49 percent between 1996 and 2001, whilst corroborating that Atacora was indeed the poorest department in both monetary and non-monetary terms.

This expanded poverty definition has been paralleled by an appreciation that as poverty may have multiple causes and determinants (fourteen were identified in the Benin case, ranging from inadequate employment programmes for the handicapped to the unavailability of micro-finance), there is a consequent likelihood that the survival or livelihood[19] strategies adopted by the vulnerable are likely to be equally diverse and/or complex. Morris (2002), for example, found that the monetary income of the poorest tercile of farmers in the semi-arid region of Shinyanga in Tanzania was derived from a combination of subsistence cropping of low return, drought resistant crops such as sorghum and millet (44 per of income), off-farm activities ranging from cotton harvesting to migration (37 percent), and asset adjustment in the form of livestock sales (16 percent). These responses are however, in large part, conditioned by ownership of – or access – to underlying resources, whether they be in the form of natural (such as land), physical (such as livestock), financial, or human resources. As Radoki (1999:322) puts it;

> "The crucial determinants of households" ability to achieve increased well-being are their access to capital assets and the effects of external conditioning variables which constrain or enhance the productive use and accumulation of such assets."

Recognition that households have a range of different capital assets which are deployed to maintain and/or improve livelihoods has prompted the emergence of new analytic frameworks designed to enhance policy formulation in the poverty field. The capital assets

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[18] These being; the probability of death between ages 1-4, the illiteracy rate (6 years and above), lack of access to health services (5+ kilometres away) and safe drinking water, and percentage of children under 3 who were underweight (PRSP-Benin, 2002:13).

[19] By livelihood we are referring to "the activities, the assets, and the access that jointly determine the living gained by an individual or household" (Ellis, 1999:2).

framework identified by the World Bank (2000:34ff) and the Sustainable Livelihoods Approach (SLA) pioneered by Dfid-UK represent two such attempts to better understand – and redress – the determinants of poverty in all its dimensions, viewing the livelihood strategies adopted by the poor as consequent upon their access to a series of underlying assets/capitals (Box 4). For example, if a household suffers a loss in the income or subsistence stream derived from natural capital (harvest loss occasioned by, say, drought), this can be offset by one, or a combination of, increased human capital utilization (migration to seek temporary work, say), the disposal of physical assets (sale of livestock or household durables), the increased use of financial assets (running-down savings and/or increased borrowing), and falling back on social capital options (increased remittances from extended family members, social support networks, religious and political organizations etc.).

Box 4
Types of capital assets (bank terminology) and capitals (Dfid SLA terminology)

Natural capital/assets – These encompass land, water and other environmental resources such as forests, fish stocks, and mineral deposits. Access will be determined by existing property and inheritance rights (both formal and informal) and the market opportunities to acquire/dispose of such rights (leasing, rental, terms of sale and purchase etc.).

Human capital/assets – This refers to the quantity and quality of labour resources available to the individual/household, the precise level of which is determined by factors such ass educational level, innate skills and health status.

Physical capital/assets – This includes infrastructure (roads, access to electricity and other utilities) and productive equipment, as well as the individual's/household's housing stock.

Financial capital/assets – Alludes to the financial resources (whether in the form of savings, credit, remittances and pensions for example) available to the individual/household.

Social capital/assets – Can be interpreted in terms of; " the rules, norms, reciprocity and trust embedded in social relations, social structures, and society's institutional arrangements, which enable its members to achieve their individual and community objectives (Narayan, 1997:50)." Specifically it refers to contact networks that can be activated as needs dictate as well as "political influence over resources (World Bank, 2000:34)."

Source: Adapted from Thorpe (2002).

These frameworks have increasingly informed the development of PRSPs and national poverty reduction strategies as well as donor programmes, with governments and external donors now seeking to advance policies which either; (i) increase access to capital assets, and/or (ii) address external conditioning variables so as minimize those which constrain, and/or further enhance those which are conducive to, increased well-being. In the Benin PRSP, for example, not only was provision made to increase women's access to land through the preparation of a gender-sensitive rural land code, but proposed improvements in the legal

and regulatory framework governing micro-credit institutions was likely to sweep away a number of constraints that inhibited female access to credit (PRSP-Benin, 2002:70–3).

Such a multidimensional approach sits well with the fisheries sector in the developing world. Research has shown that fishing is often only one – generally seasonal – aspect within a complex and flexible livelihoods strategy matrix. As Bailey (1994) put it;

"It is a mistake to view fishing communities as made up exclusively of fishers or to view fishers only as fishers. They are also farmers, craftsmen, charcoal makers, and occupy a host of other occupations. This occupational multiplicity reduces a fishing household's vulnerability to loss associated with any one activity, and it tends to keep fishers off waters for significant portions of the year".

Salagrama's work (2000) supports Bailey's assertion, highlighting that while fishing is the principal occupation in the northern and southern zones of Andhra Pradesh in India, the activity is supplemented by a series of other options (wage labour in agriculture, selling forest produce, extraction of salt etc.). Equally, Béné *et al.* (2000) found that, on average, households on the Yaéré floodplain in Cameroon were involved in between 2.9 and 3.4 activities depending on wealth-status[20], while Payne (2000:4) notes that only 20–30 percent of the total catch on the Bangladeshi floodplains is taken by full-time fishers.

Yet while complex livelihood strategies – by themselves – are not redolent of poverty, the vulnerability of the poor makes them more likely to develop and, under certain circumstances, exploit all possible livelihood options. This is certainly the case in fishing-centric communities given the potential links between poverty and the resource base (see Figure 3.1). Inclusive, the Code of Conduct of Responsible Fisheries (CCRF) implicitly recognizes the latent vulnerability of the sector in arguing that members of small-scale fishing communities and artisanal fishers should receive special assistance and protection in order to derive a "secure and just livelihood (Art 6.18)". It also connects strongly to the principles espoused in the World Bank's 2000/1 World Development Report, and operationalized in many national poverty reduction strategies, of attacking poverty by promoting opportunity, developing capability, enhancing security, and facilitating empowerment.

But in order for the sector to avail itself of the opportunities offered by the strengthened poverty focus encountered in contemporary NDPs and donor support programmes, concrete evidence substantiating the endemic nature of poverty within fishing communities must be provided. However, since Gordon (1954:132) noted a half-century ago, that;

> "In point of fact, fishers typically earn less than most others, even in much less hazardous occupations or in those requiring less skill".

[20] In fact these figures probably understate the complexity of local livelihood strategies as only four activities (agriculture, fishing, cattle-holding, and trade) were considered. Decomposing these four activities (agriculture could be split into the production of permanent or annual crops, or equally differentiating between a livelihood that results from the sale of agrarian labour and the production of own crops for example), would almost certainly provide evidence of more complex livelihood strategies.

Dimensions of poverty and links to the fisheries sector
(adapted from Shyamsundar *et al.*, 2001)

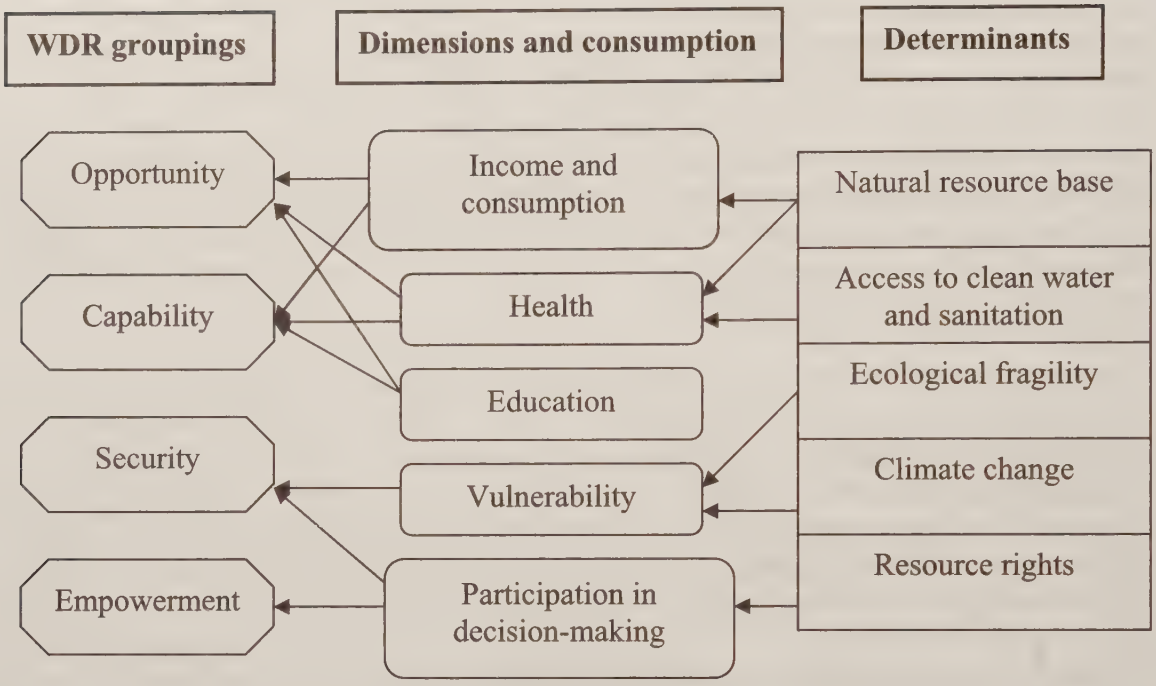

Figure 3.1

the poverty of fishers and fishing communities has been taken as given. Béné (2002) provides a useful synopsis of the literature linking poverty and fisheries, but the majority of the evidence – as Macfadyen and Corcoran (2002) have corroborated – is largely anecdotal. The few quantitative studies that do exist produce somewhat contradictory findings – while Mkenda's (2000) research, as we have noted earlier, suggests that artisanal fishers are better off than peasant farmers in rural Zanzibar, other studies such as STREAM (2000) and Béné *et al.* (2000:7) note that the poorest households in the chosen research regions are more likely to be dependent on fishery activity (even if the direction of causality is disputed)[21]. The literacy lacuna and the limited understanding of the underlying causal mechanisms linking poverty and fisheries has recently caused the FAO Advisory Committee on Fisheries Research (ACFR) to recommend further research into the area. Similarly, concern regarding such linkages has seen the application of poverty profiling techniques to fishing communities, thereby not only deriving powerful analytic tools for future sectoral poverty assessments, but also will help prioritize poverty reduction measures in such communities. In Sub-Saharan Africa the work of Pittaluga and the SFLP on the inland lakes of West Africa, is particularly notable in this regard – as is the work of Mori and Xuan in Viet Nam[22]. Such

[21] The STREAM paper, for example, takes the line that *households are poor because they are fishers* – and argues that in wild capture fisheries there is "considerable potential for addressing poor people through interventions directed at those fisheries (2000:31)". Conversely, Béné *et al.* (2000:14/5) argue that *households fish because they are poor* – and attribute the root cause of poverty to the predominance of private property relations in the area, relations which force those households with inadequate access to land to resort to fishing in order to meet their income and consumption requirements. Identification of the correct causal relationship is therefore imperative if optimal amelioratory policies are to be introduced.

[22] Comparable work on the agricultural sector under the Livelihoods and Diversification Directions Explored by Research (LADDER) programme sponsored by Dfid-UK produced micro-evidence which suggested the creation of "… a facilitating environment that encourages the flourishing of diverse monetised rural activities in

endeavours are complemented by a research project which seeks to over-sample fishing communities in the Living Standards Measurement Surveys (LSMS) currently being undertaken by the World Bank in Ghana and Sierra Leone so as to provide a comprehensive data set which aids in exposing such causal mechanisms. Unfortunately, the ongoing nature of such research dictates that we must look elsewhere in order to advance a present case for the sector's inclusion in national development programmes on the grounds that it harbours an above average relative quotient of the poor.

In consequence, **this paper selects two criteria for proxying the significance of the sector in equity terms. First,** given the absolute absence of fisheries-specific national poverty statistics, the following analysis uses levels of rural poverty as a second-best measure to reflect the likely magnitude of poverty in the fisheries sector. This analytic oversimplification can be exculpated perhaps on the grounds that the vast majority of fishers are to be encountered in rural, as opposed to urban, areas[23] and so aggregate rural poverty statistics are more likely to capture (albeit only partially) poverty within the sector[24]. The more profound the nature of rural poverty then, the more likely it is that poverty reduction strategies will be targeted upon the sector, thereby benefiting the fisheries sector either directly (specific interventions in the fisheries field) or indirectly (by, say, reducing the costs of accessing rural credit for productive purposes).

Second, if poverty is endemic within fisheries communities as anecdotal evidence has suggested, then the potential for poverty-reducing, fisheries-specific, policies grows in line with the numeric size of the sector. The more (poor) fishers there are, the greater the potential for mobilization – and the more difficult it is for policy-makers to ignore such voices in the participatory dialogues that are increasingly informing national development processes[25]. In fact, this measure may well understate the true importance of the sector, as there is evidence that for every person fishing there are a further three involved in processing, marketing or distribution activities. The greater the magnitude of rural poverty and the greater the number of fishers then, the greater the potential opportunities for inserting the fisheries sector into national development and poverty reduction strategies on equity grounds.

The relative importance of the fisheries sector in terms of either growth (as measured by its contribution to exports and/or the domestic consumption of animal protein) and/or equity (as measured by the level of rural poverty and/or the numeric size of the sector) considerations will vary from country to country. The following sub-section therefore uses such considerations to derive and apply a simplistic framework intended to identify those countries

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Tanzania/Malawi should be the centrepiece of rural poverty reduction thinking" (Ellis and Mdoe, 2003:1381; Ellis *et al.,* 2003:1508).

[23] Moreover, as fishers are often involved in multiple activities in order to sustain their livelihoods, as we have noted above, rural poverty statistics are also likely to incorporate rural households whose main or secondary incomes are derived from fishing.

[24] The exceptions are those involved in fish distribution or marketing, occupations which are more urban-based. However, given the immense data shortcomings in the field and the small proportion of the urban economically active population employed in fish distribution and marketing, this paper will continue to view poverty in the fisheries sector as an essentially rural-based phenomenon.

[25] Size (in employment terms) does not necessarily equate with size (in production output terms). Iceland, for example, is highly dependent on its fisheries sector in terms of GDP and exports, as we have noted earlier – but much less so in employment terms (6,100 fishers out of an economically active population of 161 000 = 3.8 percent) due to the industrial nature of its fisheries. Countries with large numbers of fishers, particularly in terms of the economically active population, are placed more towards the small-scale (marine coastal and inland as opposed to marine deep sea) end of the fisheries continuum – the end where poverty is more likely to be concentrated (FAO, 1999; Macfadyen and Corcoran, 2002).

in which the prospects for fisheries insertion into national development programmes and poverty reduction strategies (on either growth or equity grounds) are greatest. The subsequent section (Section Four) then uses these findings to identify which countries are currently punching "above" or "below" their weight in this respect.

3.3 *The importance of the fisheries sector in the developing world*

This section examines the relative importance of growth and equity considerations vis-à-vis the fisheries sector from a regional perspective. Five regions are identified (Latin America, Africa – which is further sub-divided into countries with/without PRSPs, Asia, the transition economies, and small island developing states[26]). Growth considerations are examined using scatter-plots of the association between contributions to trade and consumption. The value of each country's fisheries exports as a proportion of the total value of agricultural exports (including fisheries commodities) during 2000 indicates the relative importance of the sector as a foreign exchange source (FAOSTAT). National reliance upon fisheries for domestic nutritional purposes is measured by taking average per capita fish protein consumption as a proportion of total daily animal protein, also at 2000 values (FAO: Food Balance Sheets).[27] To examine the equity issues, we plot the number of fishers as a proportion of the economically active population in 2000 against the rural poverty headcount index, which is unfortunately only available for about half the countries examined.[28] Annex 1 reports the data used for this exercise. The analysis begins by evaluating the full dataset.

All countries

Table 3.1 shows descriptive statistics for all countries included in the analysis

Table 3.1 Descriptive statistics: all countries

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	127	0.0	99.8	18.5	24.9
Fish as a percentage of average daily protein consumption	129	0.3	84.8	19.4	18.7
Fishers as a percentage of the economically active population	129	0.0	22.0	1.3	2.6
Rural poverty headcount index	63	4.6	86.5	44.3	19.8

These figures yield several stylized facts. Fisheries made an important contribution to trade, sometimes constituting almost the entire value of agricultural exports. However, forty-three countries ran trade deficits in fisheries commodities that year, including several countries in which fisheries were the principal component of exports. Fisheries commodities were the

[26] We use the UN recognised definition of Small Island Developing States (see http://www.un.org/special-rep/ohrlls/ohrlls/allcountries.pdf although this, paradoxically, encompasses states which are neither particularly small – either geographically or in population terms (Cuba, Jamaica), nor islands (Guyana, Guinea-Bissau).

[27] Data from a limited number of countries (Fiji, Kenya, Malaysia, Papua New Guinea, the Philippines, Sierra Leone, the Solomon Islands, Sri Lanka and Zimbabwe) was not available in the Food Balance Sheets. In these instances, figures were taken from the World Resources Institute's Earth Trends Environmental Information Portal.

[28] The number of fishers is derived from FAO Fishery Country Profiles, and data for the total economically active population from FAOSTAT. We have used the most recent estimates of the rural poverty headcount index from the following sources: World Bank (2001), the World Bank Poverty Monitoring Database, and IFAD (2001).

main source of protein in several countries and on average contributed about twenty percent of average daily animal protein consumed. Overall, fisheries employment constituted a small proportion of the total labour force throughout the sample, only exceeding ten percent in the case of two small states. In most instances, fisheries employ less than one percent of workers, although this may not necessarily reflect the sector's local or regional importance. Finally, it is evident that rural poverty was a major problem in those countries for which data is available: on average, nearly one in two persons subsisted below the poverty line.

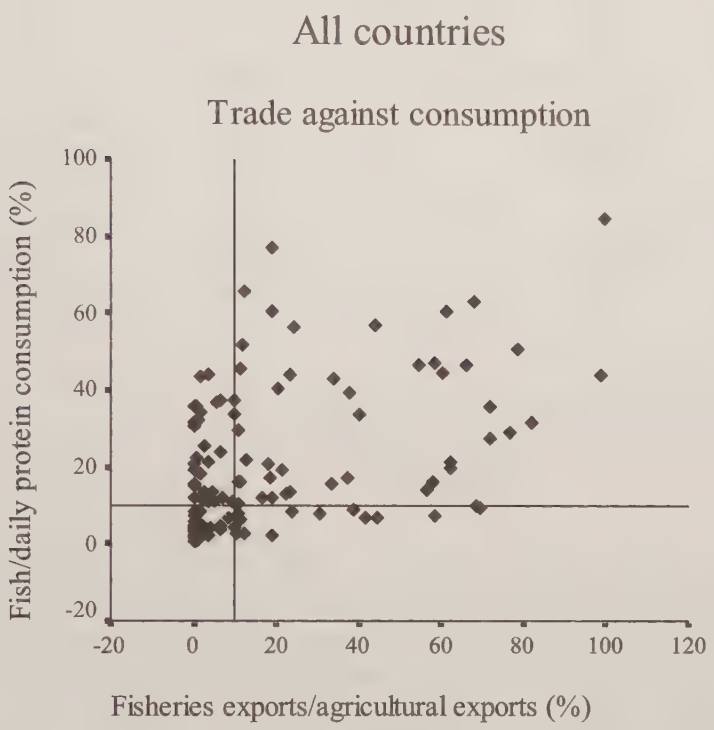

Figure 3.2

Figure 3.2 shows the relationship between the contribution of fisheries to trade and consumption in 127 countries. There is some evidence of a positive association between the two variables, but the diversity of fisheries production and distribution chains and the different cultural milieu in which fish is consumed suggest there is unlikely to be a simple relationship between trade and domestic consumption. Horizontal and vertical reference lines, set at ten percent of agricultural trade and ten percent of daily animal protein, divide the chart into four quadrants. We interpret Figure 1 and subsequent charts as follows. Countries in the Northeast quadrant (44 countries) saw the greatest contribution to export earnings and national diets. As a consequence, we would anticipate the fisheries sector being highly integrated into national development strategies in these countries. Conversely, fisheries were relatively unimportant to trade and diets for countries in the Southwest quadrant (41 cases). This does not necessarily mean that economic development and poverty reduction strategies in these countries should ignore the sector, as low domestic consumption levels, for example, could be a corollary of underdeveloped markets and infrastructure. Fisheries in countries in the Southeast (13 cases) and Northwest (29 cases) quadrants made a greater than (below) average contribution to export earnings, but contributed a lower (higher) share of consumption. Development strategies in these countries might contemplate the possibility of a trade-off between export earnings and domestic consumption.

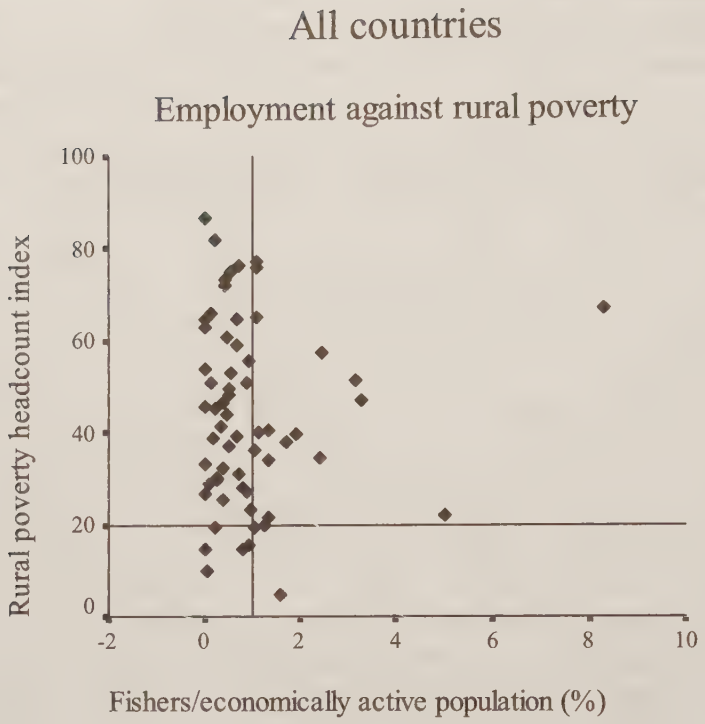

Figure 3.3

Figure 3.3 plots fisheries employment against the degree of rural poverty in sixty-three countries. Given the significant range of the figures for employment and rural poverty, reference lines are set at one percent and twenty percent respectively. It is evident that most countries were in the North West quadrant (39 cases), signifying high levels of rural poverty but a low sectoral employment rate. A minority were in the Southeast (2 cases) and Southwest (5 cases) quadrants, while some seventeen economies were located Northeast of the reference lines.

In light of the relationships between trade, consumption, employment, and rural poverty outlined above, we now turn to the analysis of individual country groups.

(i) Latin America

Table 3.2 summarizes the data on Latin American economies

Table 3.2 Descriptive Statistics: Latin America

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	17	0.0	62.2	17.0	18.5
Fish as a percentage of average daily protein consumption	17	1.7	20.0	6.6	4.8
Fishers as a percentage of the economically active population	17	0.1	3.2	0.7	0.7
Rural poverty headcount index	14	14.7	81.7	53.1	20.3

Latin America includes some of the world's most important fisheries producing nations, dominated by the Peruvian industrial fisheries. Marine capture fisheries predominate,

although there were sizeable inland fisheries in Brazil and Mexico, and aquaculture production exceeded 50 000 tonnes in Brazil, Chile, Colombia, Ecuador, and Mexico. Although many of these fisheries are export-oriented, on average the sector's contribution to agricultural exports was lower than for all developing economies. It is also the region with the lowest per capita consumption (after the Transition Economies). The employment rate in the region was modest and substantially below the average for all countries. Rural poverty is a major development issue throughout the region.

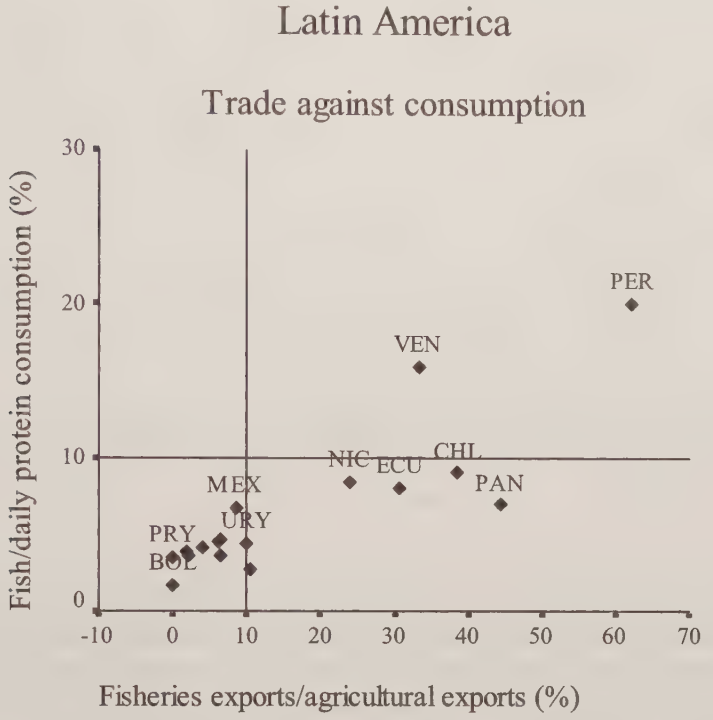

Figure 3.4

Figure 3.4 illustrates the above point about consumption, indicating that Peru and Venezuela alone were located in the Northeast quadrant, although the absolute volume of Peru's exports set it apart from the other countries in this region. Chile, Ecuador, Honduras, Nicaragua and Panama inhabited the Southeast quadrant, indicating their export-orientation, with Uruguay marginally outside this quadrant. Chile and Ecuador were the major producers within the Southeast quadrant. No country was located in the Northwest quadrant, revealing the relative unimportance of fish in Latin American diets. Of the ten Southwest quadrant countries Argentina, Brazil, and Mexico were major fisheries producers. The region, with the exception of the land-locked states of Bolivia and Paraguay, and Brazil, ran a substantial fisheries trade surplus during 2000.

Figure 3.5 shows the relationship between fisheries employment and rural poverty. The sector's contribution to regional employment is weak: only Ecuador and Panama lie in the Eastern quadrants. Countries to the left of the one percent level of employment reference line typically fall into one of three distinct categories. Several countries (Argentina, Chile, Peru, and Venezuela) have large capital-intensive fisheries. A second group (including Brazil, Ecuador and Mexico) have a mixed fishery including a large artisanal sector. Finally, there are those countries where artisanal fisheries predominated, typically Central American republics. With respect to rural poverty, only Chile fell below the twenty percent reference line.

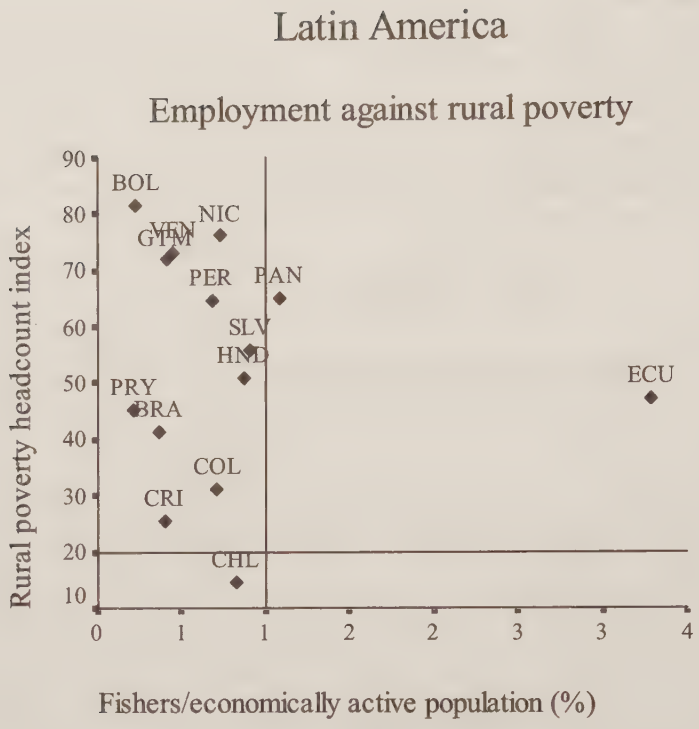

Figure 3.5

(ii) African countries with PRSPs

Table 3.3 summarizes the characteristics of African states for which PRSPs are available.

Table 3.3 Descriptive Statistics: Africa – PRSP States

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	25	0.0	68.5	17.3	25.4
Fish as a percentage of average daily protein consumption	26	1.4	65.8	25.0	19.5
Fishers as a percentage of the economically active population	26	0.0	8.3	0.9	1.6
Rural poverty headcount index	16	32.4	86.5	56.8	16.2

Compared to the data presented in Table 3.1, it is evident that fisheries play a less important role in these states, which on average experienced a higher incidence of rural poverty. None of these economies were a major global fishing nation during 2000, which may in part be attributable to the dependence upon inland fisheries by a large number of these countries.[29] With respect to consumption, the countries range from those where fish played a negligible role in domestic diets (e.g. Djibouti, Ethiopia), to those where it accounted for some two thirds of animal protein consumed (Ghana and Sierra Leone).

[29] Of the 26 African PRSP states, twelve depended upon inland fisheries for more than 90 percent of fisheries production in 2000 (Burkina Faso, Central African Republic, Chad, Democratic Republic of Congo, Ethiopia, Kenya, Malawi, Mali, Niger, Rwanda, Uganda, Zambia).

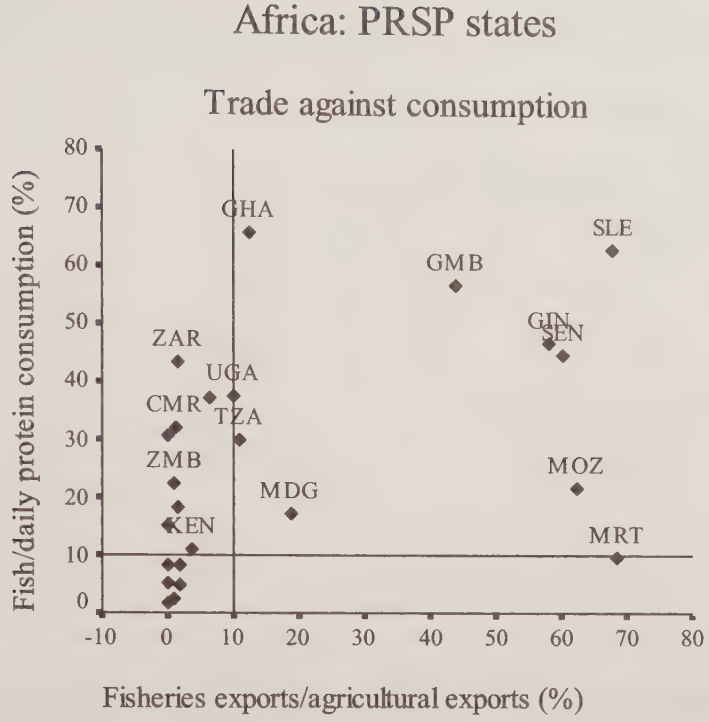

Figure 3.6

Figure 3.6 plots trade against consumption. Ten countries were located in the Northeast quadrant signifying a high contribution to agricultural exports and to domestic consumption. Of all the countries examined, Sierra Leone ranked tenth with respect to its fisheries trade contribution but fourth by consumption. Only Mauritania was positioned in the Southeast quadrant where we expect to find the more export-oriented countries. Ten countries were positioned in the Northwest quadrant, although Uganda was on the cusp of the Northeast quadrant. The remaining countries (Burkina Faso, Central African Republic, Djibouti, Ethiopia, Niger, and Rwanda) were located in the Southwest quadrant, although consumption in the Central African Republic and Rwanda was close to the ten percent threshold.

Data on rural poverty was available for sixteen African states completing PRSPs. Since rural poverty exceeded twenty percent in each case Figure 3.7 only shows the Northeast and Northwest quadrants, containing five and eleven countries respectively. Although the employment rate in relation to the economically active population averages just below one percent, this figure is somewhat distorted by Chad where the employment rate exceeds eight percent. Employment also exceeded the one percent level in Ghana, Madagascar, Senegal, and Sierra Leone, plus Benin and Mali (not shown in Figure 3.7). Of these countries, the level of rural poverty is greater than two-thirds in Chad, Madagascar, and Sierra Leone. A number of countries in the Northwest quadrant, such as Burkina Faso, Djibouti, Lesotho and Niger, are very small fisheries producers. Conversely, while Cameroon, Kenya, Tanzania and Uganda were all significant producers, the relative magnitude of employment in the sector was nonetheless low.

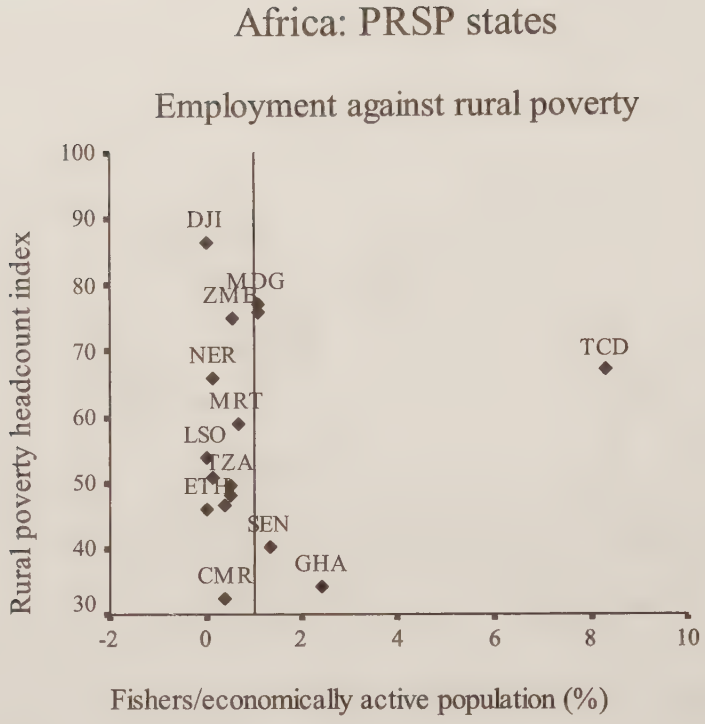

Figure 3.7

(iii) African countries without PRSPs

There is considerable diversity among these economies. Egypt, Morocco, and South Africa were the group's major producers, although production in Nigeria exceeded 500 000 tonnes in other years. Production was primarily from marine fisheries, although there were major inland fisheries in the Democratic Republic of Congo, Egypt, and Nigeria, with the most sizeable incidence of aquaculture found in Egypt. Employment and poverty rates in these countries were lower than in those African states completing PRSPs, this also being the case with respect to consumption.

Table 3.4 summarizes the characteristics of those African states for whom PRSPs are not available

Table 3.4 Descriptive Statistics: Africa – Non-PRSP States

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	20	0.0	81.9	22.0	29.0
Fish as a percentage of average daily protein consumption	20	1.9	45.6	17.7	14.5
Fishers as a percentage of the economically active population	20	0.0	1.5	0.6	0.4
Rural poverty headcount index	6	21.6	62.8	33.6	15.2

Figure 3.8 shows five countries were located in each of the quadrants. There is no clear factor underlying these groupings, with perhaps the exception of those countries in the Southwest quadrant, which were all small producers during 2000. Of those countries to the right of the

ten percent contribution to agricultural exports, Algeria, Angola, and the Republic of Congo ran deficits on fisheries trade. All the countries to the left of this reference line (with the exception of Burundi, Somalia and Sudan), also ran trade deficits.

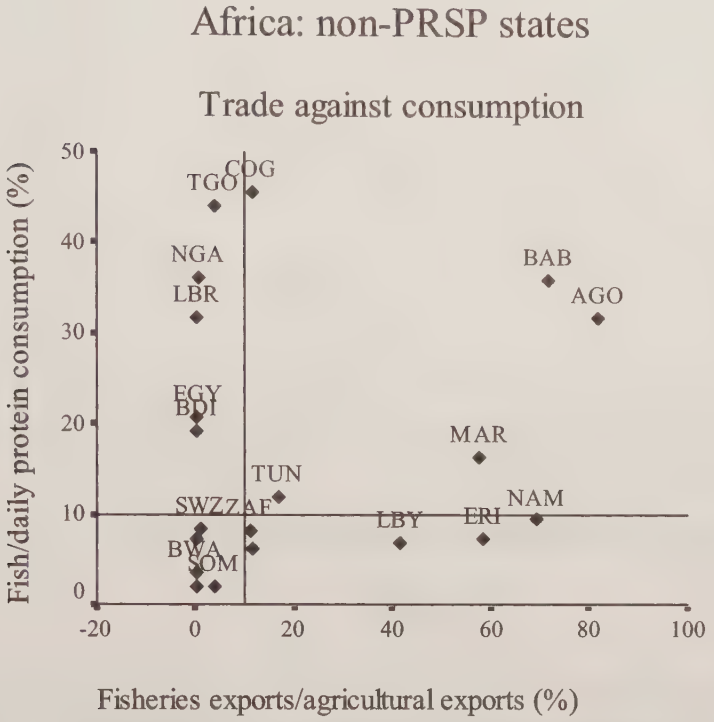

Figure 3.8

Figure 3.9 reveals the marked absence of comparable data on rural poverty for this group of economies (just six observations), with each of the six exhibiting rates that exceeded twenty percent. Nigeria and Tunisia alone appear in the Northeast quadrant, although Gabon (not on scatter diagram) witnessed the highest rate of sectoral employment among non-PRSP African states. Among countries in the Northwest quadrant, the sector in Egypt and Morocco was a large employer in absolute terms, employing approximately a quarter of a million persons in the Egyptian case during 2000. Fisheries employment in Algeria at about 26 000 persons was modest considering that countries" large coastal population, while the sector in Zimbabwe was extremely small, employing less than 2 000 persons.

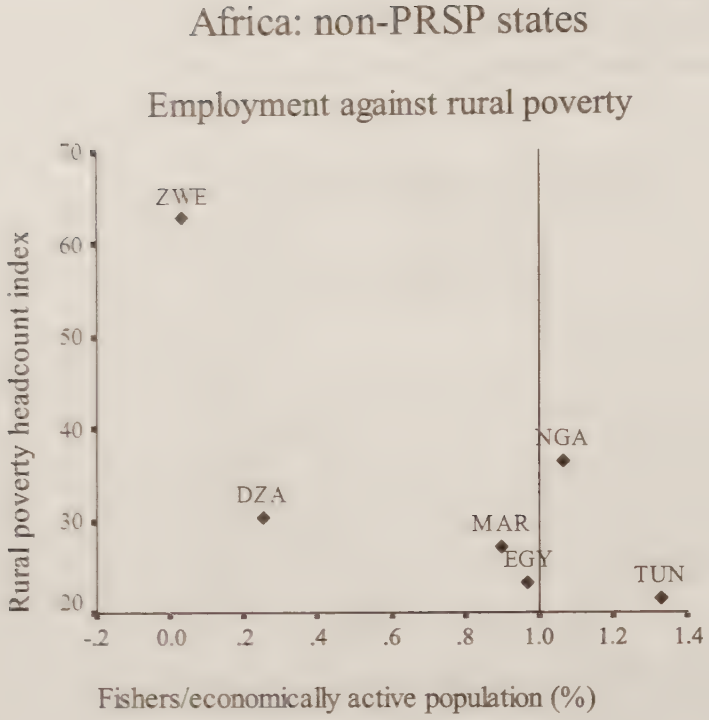

Figure 3.9

(iv) Asia

Table 3.5 summarizes the characteristics of Asian states.

Table 3.5 Descriptive statistics: Asia

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	20	.00	78.45	23.68	24.037
Fish as a percentage of average daily protein consumption	20	1.82	56.41	26.68	19.1
Fishers as a percentage of the economically active population	20	.00	4.99	1.33	1.22
Rural poverty headcount index	15	4.60	57.20	33.88	15.07

China was the largest producer from capture fisheries and aquaculture, harvesting over 41 million tonnes in 2000. This compared to the few hundred tonnes recorded in Mongolia. However, the region included the highest number of major fishing nations: Bangladesh, India, Indonesia, Malaysia, Myanmar, Pakistan, the Philippines, Thailand, and Viet Nam all recorded production exceeding 500 000 tonnes. The region's other unique feature was the contribution of aquaculture, accounting for over one-third of fisheries production in seven countries (Bangladesh, China, India, Jordan, Laos, Nepal, and Syria) and exceeding capture fisheries in four (China, Jordan, Laos, and Syria). Average consumption was the second highest of any region and poverty the second lowest.

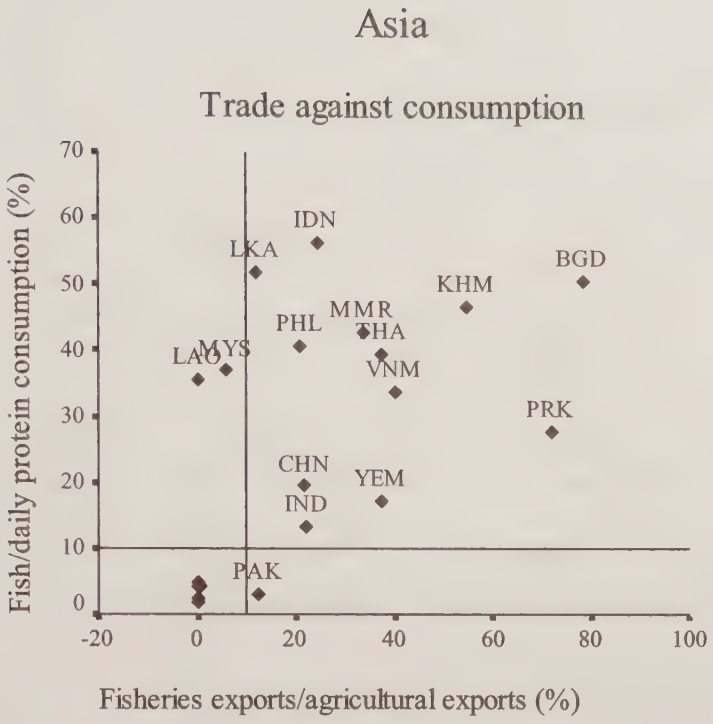

Figure 3.10

Figure 3.10 shows Bangladesh exhibited the highest fisheries contribution (vis-à-vis the value of agricultural exports) of the twelve countries situated in the Northeast quadrant – twice the level of Myanmar, Thailand, and Yemen. Fisheries accounted for a smaller proportion of the value of agricultural exports in Sri Lanka and India, the countries with the highest level of domestic consumption. Pakistan, one of the region's major producers, was the only country located in the Southeast quadrant: on average, Pakistanis only consumed some 0.7 grams of fish commodities per day – half the volume consumed in neighbouring India. Fisheries commodities demonstrated a strong contribution to domestic consumption in Laos and Malaysia, the two countries in the Northwest quadrant. Malaysia was a significant producer in 2000, while Laos ran a trade deficit in fisheries commodities that year, suggesting that imports underpinned the high daily per capita consumption in that country. Production in the five countries in the Southwest quadrant averaged just over 10 000 tonnes per country during 2000 and, with the exception of Mongolia, each ran a fisheries trade deficit in the same year.

Figure 3.11 indicates that, with the exception of Malaysia, countries in the Northeast (7 cases) and Southeast (2 cases) quadrants with higher employment rates were strongly export oriented. All but Cambodia and Sri Lanka were major fishing nations. The association between fisheries employment and rural poverty was strongest in the Philippines and Viet Nam. Thailand, another major fishing nation, was on the cusp of the Southeast quadrant, but was located with Yemen in the Southwest quadrant. Negligible employment rates in landlocked Laos, Mongolia, and Nepal ensured their location in the Northwest quadrant. Although there were a large number of fishers in Pakistan, their contribution to employment did not exceed one percent of the labour force.

Asia

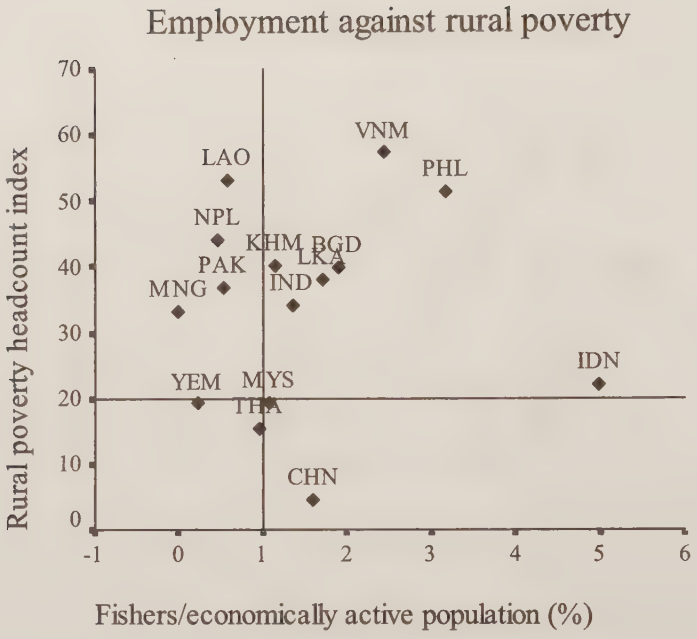

Figure 3.11

(v) Transition economies

Table 3.6 summarizes the data on the transition economies.

Table 3.6 Descriptive statistics: transition economies

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	22	0.0	56.3	6.9	13.0
Fish as a percentage of average daily protein consumption	23	0.3	14.3	5.1	4.7
Fishers as a percentage of the economically active population	23	0.0	0.9	0.1	0.3
Rural poverty headcount index	7	9.9	64.5	30.2	17.9

Fisheries were relative unimportant in transition economies during 2000. Average contributions to trade, consumption, and employment were lowest in this group. Only Russia was a major fishing nation during 2000. This reflects not only the relative levels of development and diversification of these countries (in part consequent upon post-transition decline), but also the land-locked nature of many of the states – particularly the ex-Soviet republics. For example, the combined capture fisheries and aquaculture production of countries within the Commonwealth of Independent States fell from 9.9 percent of the world total in 1988 to 3.5 percent in 2000 (FAO, 2002). The level of rural poverty was also lower than other country groups, albeit based upon limited observations. Given the rapid growth in income inequality within these states, it is probable that the full extent of rural poverty was somewhat higher than Table 3.6 suggests (IFAD, 2002).

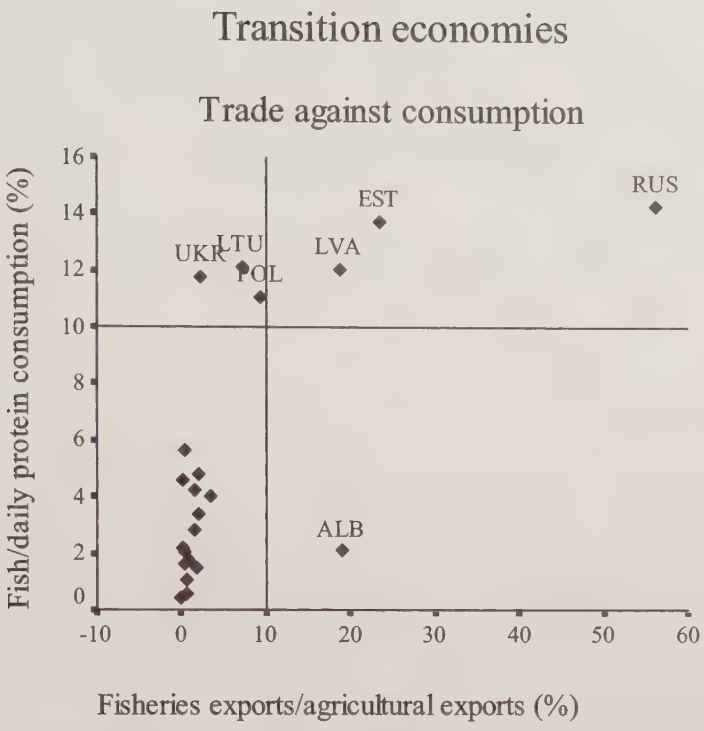

Figure 3.12

Figure 3.12 shows the association between the contribution to trade and consumption for all countries with the exception of Kyrgyzstan and Tajikistan. All countries were located in the Southeast or Southwest quadrants, since fish does not account for more than ten percent of the daily protein consumed in any country. Russia, Estonia, Albania, and Latvia were the most export-oriented countries, with the contribution to agricultural export earnings approaching the ten percent threshold in Poland and Lithuania. Six countries exceeded the ten percent threshold contribution to daily animal protein consumption (Estonia, Latvia, Lithuania, Poland, Russia, and Ukraine), each of which played an important part in the historic North European fish trade. Most Transition Economies (15 cases) were located in the Southwest quadrant, where there was considerable variation in the contribution of fish to animal protein consumption. While Annex 1 reveals national levels of consumption in these fifteen countries in detail, it is evident that fish makes the greatest dietary contribution in the western Transition Economies (e.g. Slovakia, the Czech Republic and Macedonia) compared to the eastern republics (e.g. Uzbekistan, Kyrgyzstan).

Figure 3.13 shows that employment did not exceed one percent of the labour force in any of the seven countries for which we have data (this was also the case for those transition economies not depicted in figure 3.13 due to the absence of rural poverty data) . This is not surprising as many transition economies, as we have noted above, are land-locked, hence the opportunities for fisheries development and employment are clearly limited. In the Russian Federation, the group's major fishing nation, the magnitude of the national labour force ensured that the employment rate was less than half of one percent. With the exception of Estonia, where fisheries make a significant contribution to national income, the majority of the countries examined in Figure 3.13 are very small fisheries producers, producing on average less than 9 000 tonnes in 2000.

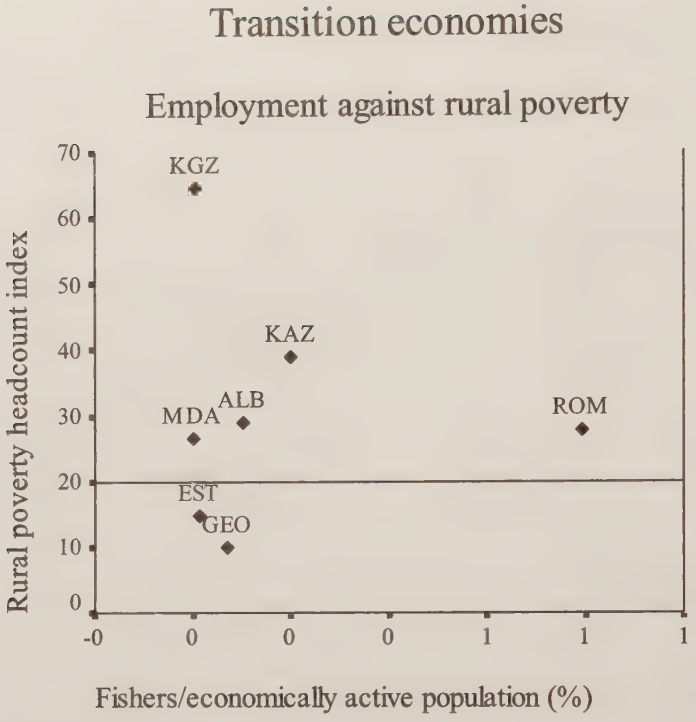

Figure 3.13

No economy in this category was a major fisheries producer during 2000: only Cuba and the Maldives produced more than 100,000 tonnes from all fisheries, with the average for the 30 countries being about 3,600 tonnes. With the exception of Cuba, Dominica, and Jamaica, aquaculture was of little importance, and freshwater capture fisheries were only important in Fiji, Haiti, and Papua New Guinea. As a group, these economies exhibit a high dependence upon fisheries, with fisheries commodities contributing more or less the entire value of agricultural exports for the Maldives during 2000. Although the contribution to trade was much smaller in other SIDS, the average was still considerably greater than for any other group. The contribution of fisheries commodities to diets and employment in SIDS was also greater than average, indicating the sector's absolute importance to these states. The rate of poverty averaged one in three of the rural population.

(vi) Small island developing states

Table 3.7 Summarizes the data on small island developing states

Table 3.7 Descriptive statistics: small island developing states

	N	Min	Max	Mean	s.d.
Fisheries exports as a percentage of agricultural exports	23	0.0	99.8	24.5	31.8
Fish as a percentage of average daily protein consumption	23	10.7	84.8	32.1	21.5
Fishers as a percentage of the economically active population	23	0.1	22.0	4.1	4.8
Rural poverty headcount index	5	20.0	66.0	43.2	19.8

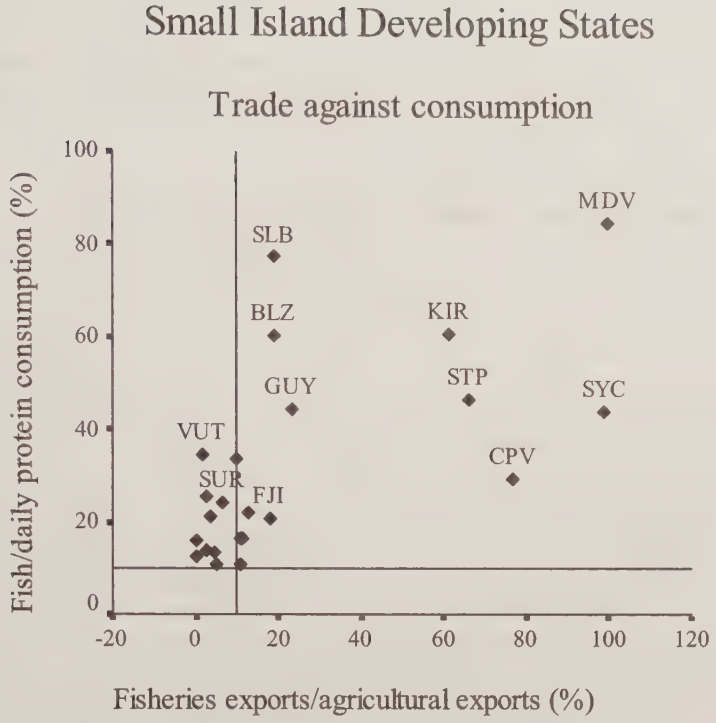

Figure 3.14

Figure 3.14 reveals the importance of fisheries trade to SIDS. However, we treat these figures with caution on grounds of the limited scale of fisheries production and economic activity in many of these countries. Fisheries contributed in excess of ten percent of the value of agricultural exports during 2000 for nearly two-thirds of the countries, with fourteen SIDS positioned in the Northeast quadrant – with the Seychelles, the Maldives, Cape Verde, Sao Tome and Principe, and Kiribati being the most strongly export oriented countries. Nine economies were located in the Northwest quadrant, including a cluster of Caribbean states (Dominican Republic, Jamaica, St Kitts and Nevis, St Lucia, St Vincent and Grenadines, and Trinidad and Tobago) where consumption was possibly exaggerated by tourism.

As Figure 3.15 shows, data on rural poverty in SIDS is limited, and it is likely that this does not present an accurate representation of the relationship between employment and poverty in this group of countries. As Annex 1 indicates, the level of fisheries sector employment in SIDS was extremely high in some cases. Fishing sector employment account for three-quarters of employment in Micronesia. Employment only fell below one percent in five cases, four of which are represented in Figure 3.15. Alternative summary measures of poverty, such as the Human Development Index, suggest that rural poverty in SIDS is likely to be significant. Consequently, we expect that most SIDS would be located in the Northeast quadrant were sufficient data available.

As is clear from the preceding analysis, there are substantive differences in the extent to which countries are reliant upon the fisheries sector in regard to trade (compare Peru to Paraguay), domestic protein consumption (compare Lesotho to Sierra Leone), employment (compare Mongolia to Indonesia) and rural poverty (compare Trinidad and Tobago to Haiti). Yet sectoral significance, in terms of either trade/consumption or poverty/employment, is no

guarantor that the sector will be effectively incorporated into PRSPs or NDPs however, as the following section shows.

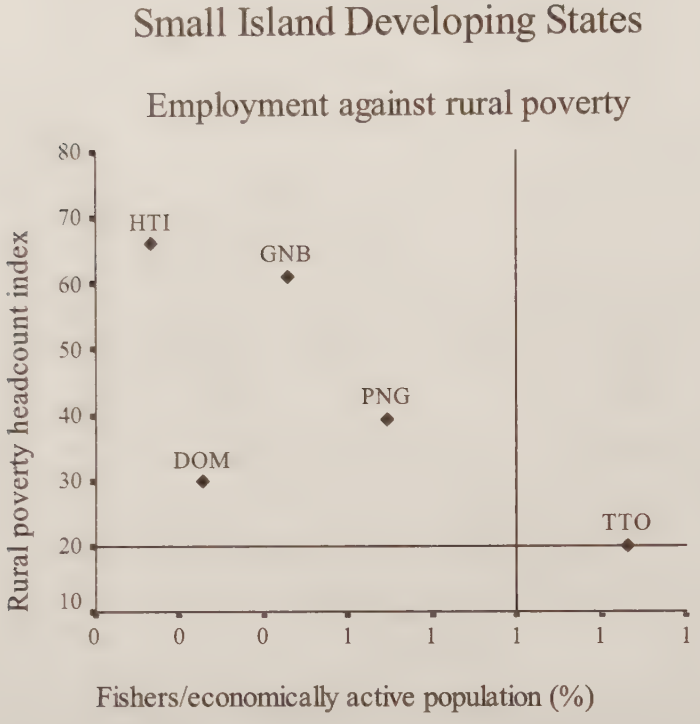

Figure 3.15

4. PRESENT EXTENT OF FISHERIES SECTOR INCLUSION IN PRSPS AND NDPS

The expectation that PRSPs provide a more comprehensive and integrated approach to development planning does not negate the opportunity for specific sectors – like fisheries – to advance their own partisan interests in the problem identification and policy formulation discourse preceding the adoption of a PRSP, but it does ensure that such agendas are "nested", as opposed to stated separately, in the resulting documents.

Unfortunately, the World Bank's suggestive 1 070–page PRSP Sourcebook only makes a few isolated references, with the exception of the environmental section (2.5), to the fisheries sector – or fisheries examples (Table 4.1). While this is perhaps attributable to the Bank's own strategy for fisheries development now being over a decade old (Loayza et al., 1992), it is nevertheless all the more surprising given the potential of the sector, as we have already indicated, as; a motor of export growth, a substantive supplier of animal protein to the national market, and a recognized harbour of poverty (see allusions to this latter point too in the Bank's PRSP Sourcebook Volume I: Sections 1.1, 2.5 and Volume II: Section 2.2 – noted in the Table below) across parts of the developing world. The oversight is particularly palpable with regard to possibly the key section of the Sourcebook – *Public Spending for Poverty Reduction* – which provides "guidance on getting started on key issues in the context of preparing a poverty reduction strategy" (2001:2). *Step 3.1 (Determining the Rationale for Public Intervention)* for example, notes that poverty mapping can "cast substantial light" on inequities in access and the "existence of spatial poverty traps" (2001:21, 22) – exactly the

sort of analysis being deployed by Pittaluga and the SFLP to such great effect in Sub-Saharan African fishing communities (2004, 2004a, 2004b). If indeed, "good poverty diagnostics – both quantitative and qualitative – are essential" to generate significant improvements in resource management and general all-round public sector performance (2001:2), then a strong case can be made for the inclusion of such materials as examples of illustrative "best practice".

Table 4.1 Occurrence of "fisheries" in PRSP sourcebook

Section	Pages	Reference
Volume 1:		
Preface and Overview	32	
1. Core Techniques		
1.1. Poverty Measurement	57	Fishers as poverty group in Madagascar 1994 (p11) Fishing and transport provide stable sources of income when agriculture income is low in N. Mali (p39)
1.2. Inequality + Social Welfare	34	Gini income elasticity (GIE) – meat and fish (p10) GIE of fish in South Africa (p12/14)
1.3. Monitor/Evaluation	33	
1.4. Development Targets/Costs	8	
1.5. Strengthening Statistical Systems	38	Mentions fish in context of FAOSTAT (p33)
1.6. Public Spending	55	
2. Cross-Cutting Issues		
2.1. Participation	53	Sample population does not include specific sub-populations – such as fisherfolk (p34)
2.2. Governance	36	
2.3. Community-Driven Development	37	Fishery association as example of Community-based org (p4) Mkt leads to over-harvesting of common-pool –fish – resources (p 6)
2.4. Gender	58	
2.5. Environment	38	Scope of environmental concern includes fisheries (p2) Subsidy of nat. resource extraction encourages overfishing (p5) Poor depend on natural resources –inc. fish (p10) Higher incomes leads to increased overexploitation – bigger fishing vessels (p12) Artisanal fishers lose out if liberalization leads to increased exp. opps. which increase commercial fishing activities (p12). Information necessary on fish stocks (p18) Indicators related to Nat. Res. Management – Table 4 (p25–6) Case of Mauritania (p27)
2.6. Strategic Communication in PRSP	38	
Volume 2:		
1. Macro and Structural. Issues		
1.1. Macroeconomic Issues	31	
1.2. Trade Policy	29	
2. Rural and Urban Poverty		
2.1. Prologue	5	
2.2. Rural Poverty	45	Mention in Table 2 – rural poverty groups (p7) Are resources – coastal fisheries – vulnerable to action by other groups (p33)
2.3. Urban Poverty	49	
3. Human Development		

Section	Pages	Reference
3.1. Social Protection	46	
3.2. Health	35	
3.3. Education	60	
4. Private Sect. + Infrastructure.		
Overview	16	
4.1. Energy	46	Fish processing occurs without use of energy (p8)
4.2. Transport	63	Infra. provn. increases income from livestock and fishing (p25)
4.3. Water	45	Fish as a pathway to human exposure to pathogens (p5)
4.4. ICT	45	
4.5. Mining	38	Environmental issue assoc. with mining can impact on income security by affecting fishing area (p7, 10, 16, 19)

The first priority perhaps then in "convincing governments and international agencies to include fisheries and aquaculture in rural development and poverty reduction strategies" (see TOR) is to ensure that the sector is more fully incorporated into support materials – like the PRSP Sourcebook – which provide guidance both on the "process" aspects of building a poverty reduction strategy, and on the practical aspects such as poverty diagnostics, specific sectoral challenges with respect to poverty reduction objectives, etc.

That said, materials such as the Sourcebook are only instructive – as opposed to prescriptive – and, ultimately, the extent to which the fisheries sector (or indeed, any sector) is nested in PRSPs or national development strategies will depend upon the economic, socio-political, structural and cultural contexts relating to specific national environments. In Section 3.C. of this report we identified elements we suggest will contribute to the ex-ante likelihood of the sector's incorporation into the national development agenda, and here we turn our attention to examining the extent of such incorporation through an ex-post analysis of national PRSPS and development plans ("Has the sector been incorporated? – and, if so, to what extent?"). The following sub-section therefore proposes a methodology for assessing the extent to which fisheries has been incorporated in published country assistance strategies, poverty reduction strategies and/or NDPs based upon work by Ekbom and Bojö (1997), Shyamsundar and Hamilton (2000), Shyamsundar *et al.* (2001), and Bojö and Reddy (2002), and Oksanen and Mersmann (2002) which examined environmental and forestry inclusion respectively. The subsequent sub-section applies this methodology to assess the degree to which countries and donors (in the form of the World Bank and European Union) in each of the identified sub-regions have embraced the sector in formulating national development agendas and donor support programmes. The concluding sub-section compares predicted ex-ante likelihood of inclusion with revealed ex-post evidence of incorporation, serving to highlight those economies where the import of the sector has evidently been recognized in ensuing discourses and emergent plans, and those countries which are presently "punching below their weight" in this regard.

4.1 Assessment Methodology

Ekbom and Bojö (1997), inspired by earlier work by Bojö and Chee (1995), World Bank (1996) and Loksha (1996), elaborated an elementary filter of thirteen criteria grouped into five sequential sections (Table 4.2) as an *aide de memoir* when mainstreaming the environment into World Bank CAS. Applying this filter to a sample of thirty-four CAS's (twenty-one from Sub-Saharan Africa, thirteen from elsewhere) they concluded that not only had environmental issues made some inroads into CAS documentation, the best CAS

integrating the theme across all sections – rather than treating the environment as a separate and distinct component – but that the filter was, moreover, a useful analytic tool for reviewing the extent to which the environment had been successfully incorporated. Furthermore, the exercise threw up a "rich flora of inspiring examples" of effective environmental mainstreaming which were potentially transferable.

Table 4.2 CAS Environmental assessment framework

Section	Rationale	Criteria
1. Issues	Are environmental problems/issues described in the CAS?	1.Environmental Problems and Opportunities Assessment 2. Environment and Health 3. Sub-Regional and International Issues
2. Driving Forces	Do (and if so, how well do) CAS's explain the underlying drivers behind the identified environmental problems?	4.Poverty, Inequity and the Environment. 5. Property Rights. 6.Population and Environment 7.Economic Policies and Environment
3. Existing Work	Does the CAS make reference to, embody, National Environmental Action Plans (NEAP) and/or Country Environment Strategy Papers (CESP)?	8. Use of NEAP 9. Use of CESP
4. Actions	What environmental actions are proposed by the Bank – and do they build on existing donor support?	10. Donor Support for Environmental Management 11.Environment and Board Agenda 12. Proposed Actions
5. Process	Was CAS developed in a participatory way which permitted stakeholder and expert input?	13. CAS Process

Source: Ekbom and Bojö (1997).

A modified version of Ekbom and Bojö's assessment framework was applied by Shyamsundar and Hamilton (2000) when examining thirty-seven CAS produced by the World Bank in fiscal year 1999. Besides amending the review criteria used[30], they derived a four-point ordinal measurement scale allowing the (subjective) evaluation of each criterion which then permitted aggregation to produce a "country score". This not only highlighted national and regional differences in the treatment of environmental issues[31], but also established a framework which allowed the environmental tracking of CAS over time. Significantly, while noting that there was still room for improvement, the authors also suggested that much of this improvement could come through the sharing of best practices (2000:3) – a number of which were highlighted in the accompanying text.

[30] Shyamsundar and Hamilton (2000) conflated the thirteen criteria deployed by Ekbom and Bojö (1997) to six: problem identification, problem treatment, extent of environmental mainstreaming, identification of an environment-poverty link, recognition of linkages between policy interventions and environmental change, and impact of incentives on natural resource/environmental issues.

[31] On a scale of 1 (issue absent) to 4 (best practice), East Asian CAS's gained a mark of 2.97, compared to just 1.81 for the Eastern Europe and Central Asian regions (Shyamsundar *et al.*, 2001:12).

The framework was subsequently directed to assess the focus of PRSPs vis-à-vis environment-related issues by Bojö and Reddy (2001). Forty Interim and Full PRSPs from across the globe were appraised and, while the four-point measurement scale remained largely intact – albeit now ranging from 0 (no mention) to 3 (good practice), seventeen criteria were now encompassed within four principal analytic categories;

(i) **Issues** (in focus): A description of the major environmental concerns and opportunities.

(ii) **Causal Links** (assessment): Poverty-Environment Link Analysis.

(iii) **Responses** (to Environmental Challenges): Environmental Management measures, monitoring and evaluation; and

(iv) **Process**: Participation and inclusion of environmental stakeholders (2001:7)

The ensuing analysis found that while average scores were low (0.9), there was considerable variation (from 0.3 in the case of São Tome and Principe, to 2.2 in the case of Mozambique), and generally a marked improvement in scores as countries progressed from interim to full PRSP status. Once more, the paper presented a number of concrete examples of good practice under each of the featured categories, intimating that tracking updates were likely as more PRSPs became available[32].

The assessment methodology was subsequently appropriated and adapted by Oksanen and Mersmann (2002) in evaluating the current status and emerging trends regarding the role of the forestry sector in Sub-Saharan African PRSPs. Twenty-five Interim PRSPs, eleven full PRSPs, 17 JSAs and four PRSP Progress Reports were analysed using a four criteria (the criteria equating to the categories employed in the Bojö and Reddy article noted above), four-point scale. The results were then compared to two broader factors – the degree of forest cover remaining in the country AND the existence of an ongoing national forestry policy and sectoral planning process – the latter appearing influential in ensuring forestry representation in PRSPs, as did modest (defined as between 7–40 percent) forest cover. Overall, while twenty-one of the twenty-four Interim PRSPs, and all the full PRSPs, mentioned the sector;

"… in general the sector was incorporated in a rather modest and unsystematic manner. The analysis of the cause and effect linkages between the forest sector and poverty and the treatment of forest related issues was generally weak. Considering this, surprisingly many forest-related responses and actions were proposed in the poverty reduction programmes (2002:123)."

An exploratory review of the relationship between small-scale fisheries and PRSPs in a 2002 SFLP sponsored study across eleven Sub-Saharan African countries was also equally critical of the incorporation process, suggesting that – with the exception of a few countries – the "situation is not very satisfactory." Worse, few fisheries-related responses and actions appeared in the final documents, as sector-pertinent issues were generally "diluted within proposals from the agriculture or rural development sector" (SFLP, 2003:3). While the study encapsulated ongoing work on poverty-profiling within the region, and was understandably

[32] The authors also noted that the review process would be extended to Joint Staff Assessments undertaken by Bank and IMF staff, and Poverty Reduction Strategy Credits (2001:21/2).

strong on process given the envisaged outcomes of the SFLP work programme[33], it unfortunately failed to produce a unifying qualitative methodology which would permit the synthesis of individual country findings.

Rather than derive a new methodology to rectify this oversight however, we instead choose to apply the assessment framework espoused by Oksanen and Mersmann, in effect substituting "fish for forest". Not only is their framework relatively straightforward to apply, it also has the added advantage of permitting cross-sectoral comparisons vis-à-vis the effectiveness of each sector's incorporation into national policy documents[34] – although this is not the task here. Box 5 therefore outlines the assessment methodology applied, and the scoring scale deployed to produce the results outlined in Section 4.2 below.

Box 5
Assessment methodology applied

Criteria 1 (Issue): Were fisheries related issues included in the analysed documents?

Criteria 2 (Causal links): Were the causal linkages between fishery-related issues and poverty related issues analysed in the documents?

Criteria 3 (Responses): Were fisheries related responses and actions defined in the documents?

Criteria 4 (Process): Were links between the document formulation process and fisheries related policy and planning processes detailed in the document?

Each of the four criteria was given a numeric value where;

0 = no mention
1= mentioned, but not elaborated upon
2= elaborated
3= Best Practice

This permits an average aggregate score to be computed for each analysed document, values ranging from 0 (sector is not mentioned in the document at all) to 3 (best practice evident on all four counts).

To produce as comprehensive and systematic a picture as possible of the extent to which the fisheries sector has been integrated into the national development discourse, we apply the above methodology to analyse contemporary PRSPs (Interim and Full) and NDPs produced across the developing world[35]. As such documents – particularly PRSPs – are expected to

[33] These include; increasing the capacity of communities and their partners to participate in planning and management; guaranteeing that fisheries communities needs are reflected in national poverty alleviation planning, and ensuring that policies, institutions and processes are informed by SFLP experiences and knowledge (SFLP, 2003a:1).

[34] This, of course, would depend on some consistency between the subjective assessments of different authors although, given the rather discrete scale involved, likely differences of opinion are reduced.

[35] It should be stressed that the purpose of this research is to measure fisheries incorporation into PRSPs, NDPs and donor support programmes. It is beyond the remit of this circular to ascertain whether the identified links, responses and processes subsequently impact in the manner intended on policy formulation or implementation.

form the basis for subsequent donor assistance, we also analyse the extent to which fisheries related issues highlighted through such national development agendas are indeed reflected in the subsequent donor support strategies[36]. Section 4.1 details these findings, adopting a regional perspective.

4.2 Results

4.2.1 Latin America

The development discourse in the majority of Latin American states (thirteen out of the sixteen) is presently not PRSP-determined, just three countries (Honduras, Nicaragua and land-locked Bolivia) having produced such documents to date. This presents a problem insofar as it is then potentially more difficult to identify the key policy document which takes precedence in defining national developmental priorities. This is less of an issue in the case of Colombia, Costa Rica, Mexico and Peru who produce comprehensive five year NDPs or Strategies, more so in the case of the other economies. The key Argentine document appears to be the National Plan for Public Investment 2003–5 (*Plan Nacional de Inversión Pública*) produced by the Economics Ministry for example, the Planning Ministries of both Brazil and Ecuador both issue Multi-year Plans (*Plano/Plan Plurianual*), Guatemala circulates its own Poverty Reduction Strategy, while El Salvador, Chile and Paraguay publish the plans or programme of the current government (*Programa/Plan de Gobierno*)[37]. Furthermore, there is also a strong possibility that the participatory processes which characterize PRSPs are absent or downplayed in documents formulated through traditional policy formulation channels – causing/continuing the marginalization of certain sectors (such as fisheries) vis-à-vis national developmental priorities. Notwithstanding these caveats, the Table below summarizes our findings (Annex 2.1. in Annex 2 provides a detailed analysis of individual country scores – with regard to PRSPs and NDPs, CAS and EU Strategy documents for each country).

Table 4.3 Inclusion of the fisheries sector in Latin American prsps and national development programmes

Criteria/Value	1	2	3	Ave.
Issues	Argentina, Costa Rica, El Salvador, Mexico, Paraguay		Peru	0.5
Links	Bolivia, Honduras	Peru		0.25
Responses	Argentina, Ecuador, El Salvador, Nicaragua, Venezuela	Brazil, Honduras, Uruguay	Peru	0.875
Process		Peru		0.125

* The average is computed with reference to the sixteen countries in the Latin American sample.

Although six (37.5 percent) of the sixteen Latin American states mention fisheries **issues,** references to the sector are – by and large – fleeting. The Argentine and Costa Rican documents hint at growth opportunities and average earnings in the primary sector (including

[36] Given the plethora of donors and donor support documents we limit our analysis to the Country Assistance Strategies (CAS) of the World Bank and the Country Strategy Papers of the EU as these are the most widely available. Equally, as said donor support documents follow from – as opposed feed into/inform/interact with – underlying national development strategies the 'process' criteria becomes redundant and is dropped.

[37] Similar problems are encountered in the subsequent analyses of development strategies in Africa (non-PRSP economies), Asia, the transition economies (TE) and small island developing states (SIDS).

fisheries) respectively, the Paraguayan text acknowledges the dangers of overfishing, whilst the El Salvadorian and Mexican programmes comment upon the need for improved institutional co-ordination at the national (Mexico) or regional (Salvador) level. In contrast, Peru devotes a whole section of the *Plan Estratégico Nacional* (PEN) 2002–6 to reviewing the status of the sector (including a SWOT analysis), details the fisheries-specific activities to be developed over the period and the results expected (Best Practice).

Peru too provides the most extensive detail on **causal links** between fisheries and poverty-related issues, proposing a national programme to encourage domestic fish consumption levels to rise by 50 percent (16Kg to 24 Kg per capita p.a.) – targeted in particular at those with scarce resources – so as to improve national nutritional levels (poverty issues not being explicitly addressed in the PEN). Conversely, both the Bolivian and Honduran PRSPs offer rather more bleak thoughts, noting how the sector underpins subsistence lifestyles and enhances health risks for certain societal groups (youths diving for shellfish) respectively.

While nine of the sixteen countries posit fisheries related **responses** in their national policy documents, five of them go no further than mentioning that; projects will be started (Argentina, Nicaragua), tariffs will be revised (Ecuador), new Fisheries Laws will be approved (Nicaragua), tasks have been identified (El Salvador) or that fisheries and aquaculture development will be encouraged (Venezuela). Brazil (eight projects – in areas such as information provision, establishment of marine parks, new fishing harbours, and the installation of fish processing centres – are identified and costed), Honduras (two projects involve fisheries – including artisanal fishing support – are costed) and Uruguay (four strategic outputs – embracing rational industrial and artesanal extraction and promoting private investment in aquaculture – are identified and the policy conduits to achieve are detailed) do elaborate upon policy responses, although the most comprehensive rejoinder is provided by Peru. The Peruvian PEN not only establishes alternative fisheries visions ("To be a global leader in fisheries exports…") and the corresponding sectoral missions, but these are broken down into a series of costed general and specific objectives which are, in turn, linked to quantitative indicators thereby allowing for rapid project/programme evaluation against targets (Best Practice).

Links between the document formulation **process** and fisheries-related policies/processes are less easy to discern however. There is no apparent involvement – at least explicitly – of sectoral stakeholders (fishers, fish-processors, line Ministries) in the identification of national concerns, or the specification of ensuing development strategies in any of the countries. Equally, only Peru – through the sub-division of the PEN into a series of sectoral documents – could be construed as assimilating national fisheries policy into the final policy document. That said, even here there is no attempt to "nest" the different sectoral programmes/ documents within an integrated development strategy.

Our research suggests that **donor strategy papers** (specifically World Bank Country Assistance Strategies and EU Country Strategy Papers) are more disposed to acknowledge fisheries **issues** (Table 4.4). Twelve of the sixteen (75 percent) **EU documents** contain references to the sector, although the majority (nine) of these do no more than allude to the sector in the context of; past reciprocal cooperation (Argentina), restrictions on foreign investment in the sector (Brazil), trading patterns (Costa Rica, Honduras, and Mexico) and potential trade obstacles (Peru), local employment provision (Guatemala) and contribution to GDP (Peru), external aid receipts (El Salvador), and the dangers of agricultural run-off to fish stocks (Panama). More attention is paid to the sector in the Ecuadorian paper – where the

dependence of the coastal economy on fish exports is highlighted and the dramatic decline in shrimp exports due to the white spot syndrome virus is detailed – and the Venezuela paper. A short economic précis of the sector is supplied, as are observations that the new fishing law, in encouraging traditional fishing, will have adverse effects on the industrial sector and, by extension, fish trade with the EU. The importance of fisheries to the Chilean economy is attributed to past policies of trade liberalization, although there is a growing realization that such liberalization may have contributed to over-exploitation of marine stocks, whilst the contribution of salmon farming to the regional economy is touched upon.

Fisheries issues are mentioned less in **Bank CAS**'s – four out of eleven (36.3 percent) instances – and preoccupations are somewhat different too. In the case of El Salvador it is worries about the impact of earthquakes on fish production that is noted, while the Panamanian document aggregates concerns about overfishing shrimp to the effects of pollution on fish catches (as mentioned in the EU document). Equally the Chilean CAS focuses less on causes (trade liberalization) and more on the consequences (increased export diversification, ecosystem fragility) than the EU paper. The Argentine CAS dwells more on the fisheries sector than the EU Strategy paper – and iterates the need for sustainable fisheries management given the fragile status of marine stocks due to past overfishing.

Table 4.4 Inclusion of the fisheries sector in the Latin American CAS and EU Strategy Papers

Criteria/Value	1	2	3	Ave.
Issues – CAS	El Salvador, Panama	Argentina, Chile		0.545
EU	Argentina, Brazil, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Panama, Peru	Chile, Ecuador, Venezuela		0.938
Links – CAS	Colombia			0.09
EU		Venezuela		0.125
Response – CAS		Argentina		0.18
EU	Brazil, Chile	Argentina	Venezuela	0.5

* The average is computed with reference to the sixteen countries in the Latin American sample for the EU Strategy Papers, but with reference to eleven countries in the case of CAS (as five countries do not have a CAS document in the public domain).

In contrast, there is little evidence in either CAS or EU Strategy Papers of cause-effect **links** between the sector and poverty. While the Colombian **CAS** goes no further than noting that opinions expressed by an Afro-Colombian fishing community on same helped informed the Bank's Voices of the Poor study, the Venezuelan **EU Strategy** paper is somewhat better, not only noting that economic diversification involving the fisheries sector will affect areas with high poverty levels, but also pledging EU support in this endeavour.

Argentina – at least according to the reviewed **CAS**'s – is the only country in which Bank **responses** to sectoral concerns are planned. Pilot efforts in sustainable fisheries management given the impending stocks crisis were upgraded in 2003 and awarded a budget of US$50 million, though few details are given on the project. Argentine fisheries figure on the **EU** agenda too, following the signing of a scientific and technical cooperation agreement (28 million euros) and European support for the formation of mixed companies and

temporary associations oriented towards exploiting local fish stocks. While, in the case of both Brazil and Chile, nothing more than EU intent to sign a cooperation agreement is signalled, the Venezuelan EU Strategy paper pinpoints local difficulties in meeting sanitary and technical standards and the limited spectrum of local catches. It then develops a consequent support programme (objective/actions/conditionality/indicators/funding) for the sector (Best Practice).

Aggregate average scores – as expected in the light of the preceding analysis of scores by individual assessment criteria – was rather poor (Box 6), ranging from 0.27 (case of CAS) to 0.5 (EU Strategy Papers), somewhat surprising in hindsight given the importance of the region's extensive marine fisheries. Only Peru's *Plan Estratégico Nacional* (PEN) 2002–6 accords the sector priority in the development agenda, fisheries barely meriting a mention in most national policy documents (PRSP or otherwise). While many of the donor documents examined mention fisheries or fishery-related issues, such issues are too infrequently elaborated, save in those instances (Argentina for the Bank, Argentina, Chile and Venezuela for the EU) where the donor has – or is in the process of mounting – a fisheries programme or cooperation agreement.

4.2.2 Africa – Countries with PRSPs

Twenty-six African nations have either drafted interim or full PRSPs, four states (Mauritania, Mozambique, Tanzania and Uganda) having also subsequently completed progress reports. The extent to which the fisheries sector is integrated into such documents is summarized in Table 4.5 (Annex 3.1. provides a detailed analysis of individual country scores – with regard to PRSPs, CAS and EU Strategy documents for each country).

BOX 6

COUNTRY	NDP	CAS	CSP
Argentina	0.5	1.3	1.0
Bolivia	0.25	--	--
Brazil	0.5	--	0.7
Chile	--	0.7	1.0
Colombia	--	0.3	--
Costa Rica	0.25	n/a	0.3
Ecuador	0.25	--	0.7
El Salvador	0.5	0.3	0.3
Guatemala	--	--	0.3
Honduras	0.75	--	0.3
Mexico	0.25	--	0.3
Nicaragua	0.25	n/a	--
Panama	--	0.3	0.3
Paraguay	0.25	n/a	--
Peru	2.5	n/a	0.3
Uruguay	0.5	n/a	--
Venezuela	0.25	--	2.3
Average	**0.44**	**0.27**	**0.50**

Nineteen (73.1 percent) of the twenty-six states mention fisheries **issues**, although in the majority of cases (12, 46.2 percent) the sector warrants nothing more than a short remark. The Chad and Malawi documents allude to the economic importance (in terms of either GDP, employment or export contribution) of fishing and other primary activities, the potential for the development of the sector is hinted at in the Ivory Coast, Malawi, Mali and Rwanda papers, while the humanitarian crisis is blamed for the slump in inland fisheries production in Sierra Leone. The Ugandan PRSP Progress Reports note the trade impact of the EU ban on Ugandan fish exports, while sectoral responsibilities (Niger), national fisheries strategies (Tanzania) and the need for private initiatives (Congo D.R.) and the optimal use of fish resources (Madagascar) also merit a mention. Other fisheries-related issues are touched upon in the Rwanda (invasive nature of water hyacinth and its impact on fishing) and Zambia (anglers and fish traders are high-risk groups vis-à-vis HIV/Aids infection) PRSPs.

Table 4.5 Inclusion of the fisheries sector in African PRSPs

Criteria/Value	1	2	3	Ave.
Issues	Chad, Congo D.R., Ivory Coast, Madagascar, Malawi, Mali, Niger, Rwanda, Sierra Leone, Tanzania, Uganda, Zambia	Benin, Ghana, Guinea, Mauritania, Mozambique, Senegal	Cameroon	1.04
Links	Burkina Faso, Chad, Ivory Coast, Gambia, Guinea, Mali, Mauritania, Mozambique, Senegal, Sierra Leone, Zambia	Benin, Ghana, Madagascar, Malawi,	Cameroon	0.85
Responses	Benin, C.A. Republic, Chad, Congo D.R., Djibouti, Ethiopia, Gambia, Kenya, Niger, Uganda, Zambia	Cameroon, Ivory Coast, Madagascar, Mali, Mozambique	Ghana, Guinea, Malawi, Mauritania, Senegal	1.39
Process	Ivory Coast, Ghana, Mali, Mozambique, Uganda	Cameroon, Madagascar Senegal	Guinea, Malawi	0.65

* The average is computed with reference to the twenty-six countries in the African PRSP sample.

More emphasis is given to sectoral developments in the Ghanaian PRSP due to the depletion of marine fish stocks, with calls for increased surveillance and the promotion of inland fisheries and aquaculture growth mooted as possible remedial measures. The document is somewhat unique amongst all the material analysed (PRSP-CAS-EU papers for all regions) insofar as it is the only one – with the exception of a brief note in the Malawi PRSP and Cape Verde national development plan in which the gender divide within the sector is highlighted. Fisheries revival also forms the thrust of the Senegalese document, with sectoral (vessel obsolescence, infrastructural and human capital inadequacies, low value-added and poor quality) and environmental constraints identified, and the economic importance of the sector underscored. The Benin document also discusses importance – in terms of presently underexploited potential, while commenting on the inappropriate fishing techniques that have clogged inland waterways. The Guinean PRSP rises to the environmental challenge, identifying the tasks necessary to both conserve and enhance national fish stocks, while highlighting the need for accompanying institutional reform. Whilst not a "fundamental area" of action for Mozambique, the sector is nevertheless viewed as a complementary activity and assigned its own sub-section in the report. Here too, the need for territorial control is stressed and environmental constraints are noted, as are the special needs of small-scale fishers. In contrast, while the Mauritanian document does not analyse fisheries issues separately, various references are scattered through the text indicating tax treatment, projected growth rates, and the potential for industrial, artisanal and coastal fishing expansion. The exemplar however is the Cameroonian contribution which forms part of an extensive and

comprehensive PRSP. An annex provides a succinct and thorough summary (Background, constraints, potential) of the sector, while the main document "nests" relevant elements extracted from the annex within the global vision and objectives[38] (Best Practice).

It is likely that the poverty-oriented reference frames of PRSPs also accounts for the relatively strong showing of **causal links** between fishery-related topics and poverty-related issues in the analysed documents (sixteen countries, 61.5 percent). That said, the majority (eleven, 42.3 percent) simply allude – as opposed to either elaborate or analyse – such linkages. The Gambian, Chad and Mali PRSPs, for example, simply state that average incomes are lowest (or that a disproportionate percentage of the poor are to be encountered) in the agricultural and fisheries sectors. Five of the PRSPs hint at the potentially empowering aspects of fisheries growth, seeing increased catches as; a latent contributor to improved nutritional levels and livelihoods (Ivory Coast, Sierra Leone and Zambia) and food security (Guinea), an "important sector" in the struggle against poverty (Mozambique), and fisheries-derived revenues as favouring those groups most affected by poverty (Senegal). The Mauritanian document is a little more cautious; suggesting the impact upon poverty will depend on market trends for fish products and gaining improved EU Agreement terms. Conversely, the Burkina Faso PRSP sees food security failings as heightening over-exploitation of local natural resources, including fish stocks.

Environmental degradation – and its consequent effect in forcing the poor to rely on natural resources (inc. fisheries) – is also highlighted in the Malawi PRSP, though this document then goes on to identify fisheries development as an explicit objective under Pillar 1 (specifically Sources of Pro-Poor Growth) of its six-point programme, given its importance as a protein source to the country. The Ghanaian document, in comparison, refers to micro-economic household analysis (Living Standard Survey and participatory poverty assessments) which identifies traditional fishers – along with a number of other rural agricultural producer groupings – as being extremely poor and vulnerable as a starting point for determining the needs of such individuals and, by definition, the key policy issues (although these are not elaborated specifically vis-à-vis the fisheries sector in the main PRSP document). Both the Benin and Madagascar documents emphasize the need to tackle poverty-fisheries linkages – either by eliminating the use of inappropriate fishing tools and techniques which are seen as the principal cause of poverty in the sector, or by establishing funding systems which enable poor fishermen to access credit. In Burkina Faso, fisheries is not considered a national priority sector, and therefore the sector has not been a direct beneficiary of PRSP/HIPC funds. The fisheries sector effectively participated in the review of the PRSP in 2003; representatives of fishing communities, fisheries administration and other stakeholders took part in the regional and national stakeholders' consultations, and various reports informed the review process. As a result, and for the first time, regional level PRSPs were developed. Although fisheries is still not a national poverty spending priority in the revised national PRSP, it is a priority sector in at least three regional level PRSPs.

Once more, best practice in this respect is evinced in the Cameroon PRSP. Participatory consultations highlight links between fisheries and poverty, with the document going on to confirm the importance of the sector in terms of both enhancing food security and creating wealth, before bemoaning stagnation in the artisanal sector as it "has good growth potential that could benefit the poor (PRSP, 2003:42)." The accompanying annex then identifies

[38] Fisheries potential, for example, re-appears in the form of a précis under the "rural sector: a key sector for economic growth" banner.

constraints which impede the industry delivering the landings necessary in order to meet the current needs of the population (Best Practice).

While many of the countries (twenty-one, 80.8 percent) recognize the need for a sectoral **response**, just over half (eleven, 42.3 percent) of the accessed documents simply content themselves with unelaborated promises. Such promises range from; basing the sectoral response on undertaking a preliminary evaluation as a first step (Congo D.R.), unattached agricultural master plans (Central African Republic), long-term development programmes (Djibouti) or a wider water resources strategy (Ethiopia), facilitating fish marketing and processing (Kenya), advancing action programmes and micro-credits (The Gambia), supporting environmentally sound fishing (Chad), stocking ponds and fisheries (Niger), researching into fishing incomes (Uganda), establishing community based natural resource management programmes (Zambia) or promising support for infrastructural development and a new fisheries code (Benin).

More substance is found in the Mali (developing new water-bodies, equipping women's wholesale fish trading associations), Mozambican (objectives and measures to be taken identified with regard to traditional and industrial fishing, aquaculture and training requirements), Madagascan (shift towards a licence based regime for shrimp, maritime and inland fisheries, with five specific actions identified under the rural development pillar), Cameroonian (strategies for expanding artisanal output and aquaculture outlined and subsequently included in an implementation matrix) and Ivory Coast (six steps necessary for sectoral development are outlined) documents however.

The best of the responses provide detailed strategies/activities AND costing/monitoring indicators of the proposed interventions. Although the Malawi PRSP does this on an aggregate basis via its Action Matrix (the 2003 Annual Review tracking progress to date), the Mauritanian policy matrix goes further and identifies the specific priority actions and costs necessary for "strengthening the fishing sector's integration into the national economy"[39]. A succinct summary of the overall fishing strategy elaborated with the support of the players involved is tracked through a 2003–5 Matrix of Measures and subsequently costed under the Priority Action Plan in the case of Senegal, while Ghanaian policy seeks to maximize economic benefits from a rational use of fish/aquaculture resources, principally through a costed rehabilitation of fish hatcheries programme. Probably the best is the Guinean document – four priority objectives concerning fisheries are identified, these objectives then being broken down into individual concrete tasks and accompanying indicative targets, and costed over three years (Best Practice).

Finally, the **process** criterion was identified in ten (38.5 percent) of the PRSPs analysed. In the main, the process extended to no more than consultation with stakeholders in the sector (five, 19.2 percent of cases) – with no/limited recognition of their inputs (Mozambique), no obvious linkages between stakeholder demands and policy analysis or responses (Ivory Coast), or simply recognition via the participatory process that some action on the fisheries front was necessary in the fight against poverty (Mali, Uganda). The Ghanaian document is somewhat more forward looking, committing the government to promote greater stakeholder participation in policy processes in the future through offering organizational support in the present. Involvement of base stakeholders in the document formulation process in Cameroon

[39] It should perhaps be pointed out that the fisheries policy emphasis is on "Accelerated and Redistributive Growth" (Policy line 1) rather than "Growth anchored in the Economic Environment of the Poor" (Policy line 2).

(specific fishing communities were involved in the national participatory assessment of poverty, and their suggestions were reflected in the published PRSP), Madagascar (unspecified capacity building in inland fisheries linked to environmental decentralization and integrated coastal zone management proposals) and Senegal (participation with the players involved identified the problems and proposed solutions for all stagers of the cycle of fisheries activity) – was rather more pro-active, helping to embed fisheries firmly into ensuing policy documents. The most effective PRSPs on this score however, are the Malawi and Guinean ones. In the Malawi case, not only were fisheries stakeholders involved and their inputs channelled via the Environment and Natural Resources thematic working group into an iterative consultative process which delivered the consequent PRSP, but the resulting document offers opportunities for enhanced future participatory inputs by the sector via a strategy of "creating mass awareness of the environment and natural resource management"[40] and the creation of Community Based Natural Resource Management groups along the coast. Guinea similarly commits itself to strengthening base capacities by supporting the development of maritime and inland fishing villages, combining this with plans to establish an national and regional structure to deliver fisheries information, creating an appropriate administrative structure in the process (Best Practice).

Donor Strategy Papers tend to be equally strong on signalling fisheries **issues** (though less so in terms of either links or responses). However, while thirteen (65 percent) of the **CAS documents** do mention the sector, references in the main (11 cases, 55 percent) are extremely fleeting. These tend to either acknowledge the importance of the sector to GDP, employment and/or exports (Mozambique), mention current fisheries growth rates (Burkina Faso, Uganda) touch upon the factors impeding sectoral development (lack of domestic demand and non-competitive labour and pricing policies in the case of Djibouti, need for peace – case of Sierra Leone, trade barriers noted but not elaborated – case of Senegal), or allude to environmental issues associated with fishing (Malawi and Tanzania). Fraud or illegalities in the distribution of fisheries licences are the raison d'être for the sector's inclusion in both the Guinean and Madagascar documents, while the Congo D.R. and Zambian CASs simply note FAO and bilateral aid extended to the sector respectively. More emphasis is found in the Mauritanian paper which stresses the importance of fisheries to the national economy and provides a shortened resume of structural reforms undertaken in the sector in the preceding decade.

Although a similar number of **EU documents** (thirteen, 59 percent) denote fisheries issues, such references are rather more profound. The Guinea CSP contains a complete section highlighting the growth, current size, challenges and constraints facing the sector (although it does neglect to detail policy responses). Equally, both The Gambian and Senegalese CSP cover comparable ground – and also choose to emphasize the need to regulate access to the sector and the lack of effective control over foreign fishing activities – albeit, in a briefer fashion (Best Practice).

[40] This includes the commitment to translate fifty years of fisheries data into user friendly information materials, to improve the fisheries curriculum in various training colleges and to launch a mass campaign on fish policy.

Table 4.6 Inclusion of the fisheries sector in African CAS and EU Strategy Papers

Criteria/Value	1	2	3	Ave.
Issues – CAS	Burkina Faso, Congo D.R., Djibouti, Guinea, Madagascar, Malawi, Mozambique, Senegal, Sierra Leone, Tanzania, Uganda, Zambia.	Mauritania		0.7
EU	Benin, C.A. Republic, Chad, Djibouti, Madagascar, Sierra Leone, Tanzania.	Mauritania, Mozambique	The Gambia, Guinea, Senegal.	0.91
Links – CAS	Benin, Mauritania,			0.1
EU	Madagascar, Mauritania,	Guinea		0.18
Responses – CAS	The Gambia, Malawi, Senegal	Mauritania,		0.25
EU	The Gambia, Ghana, Sierra Leone	Madagascar, Mauritania, Senegal.		0.41

* The average is computed with reference to twenty-two countries for the EU Strategy Papers (no Strategy Papers are available for Kenya or Ivory Coast, and the Mali and Congo D.R. ones could not be accessed due to technical difficulties), but with reference to twenty countries in the case of CAS (as five countries do not have a CAS document in the public domain).

Fish and forex earnings form the centrepiece of the Mozambican CSP discussion of fisheries issues, with substantial commercial overfishing, unlicensed fishing and smuggling contributing to declining revenues, and growing environmental problems with few benefits for the local population. Export revenues are one of four government objectives (the others are optimize fiscal receipts from the sector, create employment and enhance value-added, and improve fisheries knowledge) in the Mauritanian fisheries case, the paper also providing a brief synopsis of past EU-Mauritanian Fishing Agreements. The remainder of the papers (seven papers, 36.3 percent), mostly note donor support to the sector (case of Benin, Chad and Madagascar) or how fisheries fits (C.A. Republic, Tanzania) or doesn't (Sierra Leone), as the case may be, into the national agenda. The Djibouti CSP simply mentions the sector as an alternative generator of revenues.

Causal links are mentioned equally infrequently in both sets of donor strategy documents. The Benin **CAS document** simply comments that Southern lagoon fishers are amongst the poorest national groupings (poverty identification), while a Box profiling poverty in the Mauritanian document alludes to a credit programme devised to provide assistance to disadvantaged fisheries groups (poverty alleviation). The **EU documents** appear more concerned with poverty alleviation, suggesting that revenue generation by industrial fisheries is insufficient to eradicate monetary poverty and the focus should be shifted instead towards employment creation (Mauritania) and government policy – in fisheries as with other sectors – should seek to orientate economic performance in a way that benefits the poor (Madagascar). The exception, perhaps, is the EU CSP for Guinea which identifies regional differences in fish consumption patterns and proposes increased fish culture as a strategy to reduce such inequities.

Fisheries-related **responses** were limited to just four countries (20 percent) in the **CAS documents**. The Senegalese document alludes to an ongoing Fisheries sector Review in FY04 which will identify the technical assistance needs of the sector, while the Gambian and Malawi CAS refer to Bank projects directed at expanding fish and farmed shrimp production and activities on Lake Malawi respectively. More detail is provided in the Mauritanian CAS, specifically in terms of both past Bank collaboration in the fisheries arena and its current involvement in implementing a comprehensive Fisheries Resource Management System. Five (22.7 percent) of **EU Strategy documents** cover fisheries responses and actions. The Gambian CSP merely notes EU support in strengthening rural (including fisheries) institutions, the Sierra Leone report notes the sum of five million euros could be mobilized to evaluate local fishing resources with a view to offering same to the EU within the framework of a SL/EC Fisheries Agreement, while the remainder (Madagascar, Mauritania and Senegal) provide rather more particular information on EU Fishing Agreements with the nation concerned, how such funds were used on the domestic plane, and other collaborative ventures with the EU.

Aggregate average PRSP scores varied markedly (Box 7); one country (Lesotho) failed to mention the fisheries sector completely, the majority score below 1.0, six (Benin, Ivory Coast, Madagascar, Mali, Mauritania and Mozambique) offer good synopses in one of more of the categories to ensure an above unitary ranking, while five (Cameroon, Ghana, Guinea, Malawi and Senegal) give fairly extensive coverage to the sector in their respective PRSPs. This contrasts markedly with the minimal coverage given to the sector in Bank CASs – five countries failing to merit a mention, while only the big pelagic fishing nations of West Africa (Senegal and Mauritania) score above 1.0. This is all the more surprising perhaps given that such Bank lending strategies are supposed to be based upon the underlying PRSP documents[41]. Although the EU CSP aggregate rating is 42 percent higher (0.5, compared to 0.35) than for the Bank CASs, this is partly explained by the more detailed "issues" and "responses" evident in those countries with which the EU has (or had) a Fishing Agreement (Gambia, Madagascar, Mauritania and Senegal).

BOX 7

COUNTRY	NDP	CAS	CSP
Benin	1.25	0.33	0.33
B. Faso	0.25	0.33	--
Cameroon	2.5	--	--
C. A. Republic	0.25	n/a	0.33
Chad	0.75	--	0.33
Congo DR	0.5	0.33	n/a
Ivory Coast	1.25	n/a	n/a
Djibouti	0.25	0.33	1.33
Ethiopia	0.25	n/a	--
Gambia	0.5	0.35	1.33
Ghana	2.0	--	0.33
Guinea	2.25	0.33	1.7
Kenya	0.25	n/a	n/a
Lesotho	--	n/a	--
Madagascar	1.75	0.33	1.33
Malawi	2.25	0.7	--
Mali	1.25	n/a	n/a
Mauritania	1.5	1.7	1.7
Mozambique	1.5	0.33	0.7
Niger	0.5	--	--
Rwanda	0.25	--	--
Senegal	2.0	1.0	1.7
Sierra Leone	0.5	0.33	0.7
Tanzania	0.25	0.33	0.3
Uganda	0.75	0.33	--
Zambia	0.75	0.33	--
AVERAGE	**0.98**	**0.35**	**0.5**

4.2.3 Africa – Countries without PRSPs

Twenty-one African nations have not yet produced PRSPs – although seven (Angola, Burundi, Congo Rep., Eritrea, Gabon, Nigeria and the Sudan) are in the process of doing so – consequently, in the absence of such documents, we have resorted to using what appear to be the key national policy

[41] In some cases however, the available CAS documents lead – as oppose to lag – the PRSP documents. Cameroon is a good case in point, the full PRSP was finally produced in early 2003, yet the most recent CAS report available dates from November 2000. One would hope therefore that, when the new CAS is produced it will reflect the importance attached to fisheries in the Cameroonian PRSP.

documents instead[42]. Unfortunately, while the IMF and World Bank act as (easily accessible) repositories for PRSP documents, no such facility exists with regard to national policy documents and while identification of such documents proved to be a comparatively simple task, accessing – despite extensive and comprehensive web searches – was much less so. This notwithstanding, the Table below summarize our findings for this group of countries (Annex 3.2. provides a detailed analysis of individual country scores – with regard to national agendas, CAS and EU Strategy documents for each country).

Table 4.7 Inclusion of the fisheries sector in African NDPs (non-PRSP Countries)

Criteria/Value	1	2	3	Ave.
Issues	Equatorial Guinea, South Africa		Morocco	1.67
Links	Morocco			0.33
Responses			Morocco	1.0
Process				0.0

* The average is presently computed with reference to the three countries in the African non-PRSP sample.

Although fisheries related **issues** were raised in both the Equatorial Guinea (with regard to the potential of the sector) and South African (in terms of more explicit black empowerment within this – and other – sectors) literature, such themes were not elaborated. In contrast, the Moroccan *Plan de Développement Economique et Social 2000–4* devotes various sub-sections of the document to tracing the evolution of fisheries, the problems confronting the sector and the financial losses incurred as a result of the cessation of the Fishing Agreement with the EU (Best Practice). Although the same document does mention the lack of social security provision within the sector (**causal link**), it is particularly strong on policy **response** – identifying objective outcomes (modernization of fishing infrastructure, capacity-building – at the local and institutional level, improved fisheries surveillance and scientific research) for the period 2000–4, and costed strategies designed to achieve such targets (Best Practice).

Donor Strategy Papers are fortunately more readily accessible, at least in the case of the EU CSPs (seventeen available, 81 percent), although few (seven, 33.3 percent) Bank CAS are either in the public domain or have been completed (Table 4.8).

Fisheries issues turn up in eleven **EU CSP**s (68.8 percent), although a majority (seven, 43.8 percent) offer no more than a momentary mention. The potential of the sector is alluded to in the Eritrean, Swaziland and Congolese CSP, with growth constraints noted in the Congolese and Angolan documents (taxes and poor sanitary requirements in the case of the former, difficulties in preserving and marketing fish in the interior with regard to the latter). The Algerian report underlines the importance of sustainable fisheries development, the Tunisian and Eritrean CSPs recounts donor support, while the Gabon document advances the case – although doesn't specify precisely how – for diversifying away from oil and towards fisheries (and forestry and tourism).

[42] Such documents were identified via a combination of searches of the main Ministerial web-sites, and recourse to other documentation (CAS, EU CSP, USAID, DFID and the like).

Table 4.8 Inclusion of the fisheries sector in African CAS and EU Strategy Papers (non-PRSP countries)

Criteria/Value	1	2	3	Ave.
Issues – CAS	Morocco, South Africa, Tunisia			0.43
EU	Algeria, Angola, Congo R., Eritrea, Gabon, Sudan, Tunisia	Eq. Guinea, Morocco, Namibia, Somalia		0.94
Links – CAS				
EU	Angola, Eritrea, Namibia			0.19
Responses – CAS	Morocco			0.14
EU	Angola, Eritrea, South Africa	Gabon		0.31

* The average is computed with reference to sixteen countries for the EU Strategy Papers (no Strategy Papers are available for Liberia, Libya, Nigeria, Togo or Zimbabwe), and with reference to the seven countries which have a CAS document in the public domain.

Fisheries potential is also covered in the Somali document, although rather more extensively (meriting a separate sub-section of the report), whilst the Moroccan document enumerates both this and the enormous fisheries investment planned under current government policy following the cessation of Fishing Agreements with the EU. The cessation of, and history behind, such agreements are also detailed in both the Equatorial Guinea and Namibian CSPs. The former also noting government intentions vis-à-vis the sector, whilst the latter briefly explains the rationale for the "Namibianization" of the sector and fishery benefits accruing to Namibia under the Lomé convention terms. Three (42.9 percent) of the **CAS** papers reviewed allude to fisheries issues, either with regard to bilateral (Norwegian – case of South Africa) or multilateral (FAO – case of Morocco) support to the sector, or to simply note that the privatization of fisheries ports has now been accomplished (Tunisia).

Causal links are only evident however within the **EU Country Strategy Papers** sampled. The Eritrean food security strategy is predicated upon using revenues generated from the high-value fish export sector to support other groups within the sector, joint ventures being used as a similar strategic tool to reach marginalized groups in Namibia (redistributive options). The Angolan CSP also talks of high local levels of food insecurity, insisting that as the fisheries sector is "of such importance for food security that it must be included in the food security strategy and action plan (Angolan CSP, 2002:28)" – although no further details are given.

Just one – the Moroccan (which mentions the implementation of a pilot fisheries development programme funded by the Bank as a means of trialling new approaches to promote small-scale fishing) – **CAS** report details a fisheries-related **response. EU CSP responses** (four, 25 percent) pledge to either provide funds for improved sanitary controls (Eritrea) or fisheries surveillance under the EPRD facility (South Africa), or mention the possible start (Angola) or resumption (South Africa) of an EU Fishing Agreement with the respective African state. Gabon goes a little further, summarising the history to, and benefits expected from, an ongoing Fisheries Agreement with the EU.

Aggregate average scores (Box 8) are a little spurious in this case given the small number of countries whose national development strategy documents we have been able to locate (three, 13.6 percent) or for which there is a CAS available in the public domain (seven, 31.8 percent). However, the EU donor average of 0.48 – distilled from sixteen (76.2 percent) CSP documents bears comparison with the EU CSP average scores found in both Latin America and Africa (PRSP countries) and suggests a similar "benign neglect" towards the sector save in those instances where Fishing Agreements are in the frame.

4.2.4 The Asian economies

Nine Asian countries have completed either a PRSP (Cambodia, Mongolia, Nepal, Sri Lanka, Viet Nam, Yemen) or an interim PRSP (Bangladesh, Lao PDR, Pakistan) while other key national policy documents were analysed for another seven countries (Bhutan, India, Jordan, Malaysia, Oman, Philippines, Thailand). Table 4.9 summarizes our findings (Annex 4 Table 4.A provides a detailed analysis of national policy agendas for each country).

BOX 8

COUNTRY	NDP	CAS	CSP
Algeria	n/a	n/a	0.33
Angola	n/a	n/a	1.0
Botswana	n/a	n/a	--
Burundi	n/a	--	--
Congo Rep	n/a	n/a	0.3
Egypt	n/a	--	--
Eq. Guinea	0.25	n/a	0.7
Eritrea	n/a	n/a	1.0
Gabon	n/a	n/a	1.0
Liberia	n/a	n/a	N/a
Libya	n/a	n/a	N/a
Morocco	2.25	0.7	0.7
Namibia	n/a	n/a	1.0
Nigeria	n/a	--	N/a
Somalia	n/a	n/a	0.7
South Africa	0.25	0.33	0.33
Sudan	n/a	n/a	0.33
Swaziland	n/a	n/a	--
Togo	n/a	--	N/a
Tunisia	n/a	0.33	0.33
Zimbabwe	n/a	n/a	N/a
AVERAGE	**0.92**	**0.27**	**0.48**

Being the world's principal fisheries region in terms of captures (with half of the world's twelve largest producer countries), aquaculture production (all of the world's nine major producer countries), total population engaged in the fishery sector (85 percent of world total) and fleet size (84 percent of total decked vessels, 51 percent of powered un-decked vessels and 83 percent of non-powered boats) (FAO, 2002b), inclusion of fisheries related issues in National PRSPs and Development Plans may be reasonably expected. However, although the Asian sample scored higher than other regions with regards to almost all criteria (only surpassed by the "fishery issues" scores of the African NDP sub-sample and SIDS), only in the case of "responses" does the regional average score climb significantly above one.

Ten (66.7 percent) of the analysed sub-sample of 15 countries mention fisheries issues, with four (26.67 percent) not extending the discussion any further beyond brief references to; the potential of fly-fishing within the national tourism strategy (Bhutan), the rapid growth experienced by the sector (Viet Nam) and the importance of food safety of fish products and the potential impact of port development projects on small-scale fisheries (India), and the consequences of unsustainable fishing practices (Thailand).

Five national policy documents (35 percent) touch upon fisheries issues in a somewhat more substantial manner. A comprehensive chapter on agricultural development in the Tenth *Malaysia* Plan dedicates several paragraphs to the fisheries sub-sector, aquaculture and fisheries development prospects. The Sri Lankan PRSP discusses the impact of war on fisheries, noting that production in the north has begun to recover since the February 2002 ceasefire, and identifies severe coastal erosion as a pressing environmental concern, not least because of its negative impact on the livelihoods of thousands of fishing families. The importance of effective coastal zone management is the key fishery-related issue discussed in the Yemeni PRSP, highlighting areas of concern as diverse as overfishing, destructive fishing

practices, water pollution due to waste and chemicals, as well as the damage inflicted on coastal zones and fishing communities by tourist resort development. Three outstanding accounts of fisheries issues within the Asian sub-sample, are provided by the Cambodian PRSP, the Omani Sixth Five Year Development Plan, and the Philippine Medium-Term Development Plan. The Cambodian PRSP addresses aquaculture, fisheries management and livelihood improvement, and community fisheries in separate sections, with frequent other references helping to effectively mainstream fisheries issues throughout the document. In contrast, the Omani and Philippine documents discuss fisheries issues in distinct chapters. The Omani Plan provides a detailed evaluation of the (disappointing) performance of the sector under the preceding five year plan, this helping to pinpoint the contemporary challenges faced by the commercial and artisanal fishing sectors. In the case of the Philippines, two separate chapters, discuss in detail (i) the state, challenges and future of the agricultural and fishery sector, and (ii) environmental issues (incl. fisheries resources) and responses (Best Practice).

Table 4.9 Inclusion of the fisheries sector in Asian PRSPs and National Development Plans

Criteria/ Value	1	2	3	*Average*
Issues	Bhutan, India, Thailand, Viet Nam	Malaysia, Sri Lanka, Yemen	Cambodia, Oman, Philippines	1.27
Links	Bhutan, India, Mongolia, Pakistan, Viet Nam, Yemen	Cambodia, Philippines, Sri Lanka		0.8
Responses	Bhutan, Laos, Mongolia, Thailand	India, Malaysia, Sri Lanka, Viet Nam	Cambodia, Oman, Philippines, Yemen	1.6
Process	Laos, Yemen	Cambodia, Philippines, Thailand	Sri Lanka	0.73

* The average is presently computed with reference to the fifteen Asian countries for which we have PRSPs or NDPs. No NDP could be obtained for seven countries (The Bangladeshi interim PRSP was not analysed due to technical difficulties.)

Causal links between fishery related and poverty-related issues are mentioned in nine documents (60 percent), two-thirds of which (6, 40 percent) refer – in a rather ephemeral manner – to the employment and growth potential of the sector and/or its impact on local incomes (Bhutan, India, Pakistan, Viet Nam, Yemen), the significance of fish products in securing health and nutrition objectives (India, Mongolia), the lack of access to fishery – production enhancing opportunities for the poor (Viet Nam), the effect of environmental degradation on the livelihoods of the poor (Yemen), and the fact that certain populations engaging in fisheries are poor (India, Yemen). In contrast, while essentially commenting on the same issues, the analysis contained in the Cambodian (growth and incomes, consumption, environmental degradation), Philippine (employment and income, fishers among the poor, environmental degradation) and Sri Lankan (growth and incomes, coastal fishing communities are among the poorest) documents is somewhat more profound. Noteworthy are the discussions of fish consumption expenditure and natural resource access of the poor in the Cambodian PRSP, and the comments on vulnerability and the seasonal poverty of fishing families in the Sri Lankan PRSP.

As noted above, twelve policy documents (80 percent) contained fisheries responses, making it the highest scoring criterion in the Asian sub-sample. Whereas four countries (26.7 percent) make only fleeting references in terms of the need to establish hatcheries to re-stock rivers (Bhutan), the diversification of rural livelihoods via the promotion of fisheries (Lao PDR), the need to increase the supply of fish and fish products (Mongolia), as well as the

demarcation of areas for the protection of aquatic fauna and local fishing areas (Thailand), seven countries (46.6 percent) place rather more emphasis on fishery responses. India, with multiple responses scattered across its rather lengthy Tenth Five Year Plan, plans to promote aquaculture to diversify rural incomes in "backward regions", and to boost research activity in order to promote sustainable fisheries and aquaculture growth. The Eighth Malaysia Plan details a variety of interventions aimed at stimulating sustainable growth in fisheries, aquaculture, fish processing and ornamental fish-rearing, including improved coastal and marine resource management, infrastructure provision (fishing complexes) and promotion of research activity, and reflects on the possibility of integrating sport-fishing activities in tourism packages. Similar measures are announced in Viet Nam's PRSP, yet more emphasis is placed here narrowing the material gap between ethnic groups, and specific support policies targeting the poor such as the provision of production inputs and subsidized credit, information, training, and risk-management capacity building. Sri Lanka, basing its fisheries policy on its National Fisheries Development and Coastal Zone Management programmes, details strategies to ensure the sustainable development of the sector, combined with specifically targeted interventions to bring poor and socially excluded groups, including fishers, into the economic mainstream, yet fails to provide a fully articulated expenditure framework.

The most elaborate response strategies are outlined in the Cambodian, and Yemeni PRSPs, which include action/implementation matrixes detailing objectives, strategies, monitoring indicators and budgets – and the Omani Sixth Five year Plan and the Philippine Medium-Term Development Plan (MTDP). Rice-fish farming and aquaculture, and community-based fisheries management are identified as key components in Cambodia's strategy for equitable agricultural development. Particularly noteworthy interventions include a programme to promote improved resource access for poor families and communities, a study examining the commercial importance of freshwater fisheries, and gender-specific extension programmes – to reflect the dominant role of women in traditional farming, fishing, and related commercial activities. The Yemeni PRSP aims for fisheries growth of 7.8 percent p.a. without sacrificing stock sustainability, detailing projects and programs (Support to Research, Assessment of Fish Stock, Creation of an Integrated Marine Control and Inspection System, Creation of Quality Control Laboratories, Improvement of Traditional Fishing in the Red Sea, Fisheries Production Promotion) aimed at achieving this target. The Omani document outlines a series of objectives (including pursuit of average annual growth of 3.9 percent p.a., improving post-harvest activities) and the policies, mechanisms (encouragement of a youth ships programme, extending the provision of marine fishing licences etc.) and investment programme expected to deliver such goals. Probably the best response strategy is provided by the Philippine MTDP, however, which outlines a comprehensive strategy for agricultural and fisheries development, with the Agricultural and Fisheries Modernization Act of 1997 and the Fisheries Code of 1998 at its core. One central element of the strategy is the designation of Strategic Agricultural and Fisheries Development Zones (SAFDZ) to protect the country's agricultural and fishery resources and ensure their optimal, economically and environmentally sustainable use. Furthermore the government plans to extend education and training services to marginal sectors, including fisherfolk, by extending the National Agriculture and Fisheries Education System and strengthening its institutions, such as the National Centre and the Provincial Institutes of Agriculture and Fisheries (Best Practice).

Six national documents (40 percent) include references to the involvement of fisheries stakeholders in the policy **process**. While two (13.3 percent) countries merely mention the crucial role of women's and youth mass organizations in the process of poverty reduction (Lao PDR) or signal intentions to promote community participation in the protection of

natural resources (Yemen), four (Cambodia, Thailand, Philippines, Sri Lanka; 26.7 percent) provide more details as to the ways in which such participation is to be achieved. Most notably, the Philippine document, developed with the participation of fisheries stakeholders, outlines the legal obligation of local governments to ensure such participation in the identification of SAFDZS and the elaboration of related development plans. The most elaborate account, however, is provided by Sri Lanka, which dedicates a whole section of its PRSP to detailing a variety of community-based coastal preservation and marine resource management projects to be implemented over a period of five years (Best Practice).

Donor Strategy Papers for the Asian sample are available for 14 countries in the case of World Bank Country Assistance Strategies (CAS) and 19 countries in the case of EU Country Strategy Papers (CSP). Table 4.10 summarizes our findings (Annex 4 Tables 4.B and 4.C provide a detailed analysis of CAS and EU CSP for each country).

Table 4.10 Inclusion of the fisheries sector in Asian World Bank CAS and EU CSPs

Criteria/ Value		1	2	3	*Average*
Issues	CAS	China, India, Indonesia, Laos, Thailand, Viet Nam	Cambodia, Pakistan, Philippines, Yemen		1.0
	EU	Bangladesh, Cambodia, Korea, Laos, Malaysia, Philippines, Sri Lanka, Viet Nam, Yemen	Indonesia, Thailand		0.684
Links	CAS	Bangladesh, Philippines, Yemen	Cambodia		0.357
	EU		Cambodia, Sri Lanka		0.211
Responses	CAS	Bangladesh, Philippines, Viet Nam	Indonesia, Yemen		0.5
	EU	Bangladesh, Philippines, Viet Nam	Yemen	Cambodia, Sri Lanka	0.579

* The average is presently computed with reference to fourteen countries in the case of CAS (nine countries do not have a CAS in the public domain), and nineteen (for four countries no CSP is available).

The **CAS** – with a total of ten documents (71.4 percent) containing relevant references – are strong in terms of fisheries **issues**. General issues raised include the intention to raise the quality of aquatic products (China), the role of research and extension services in raising production (Lao PDR), donor support to the sector (Viet Nam, Philippines), fisheries related environmental issues (India, Indonesia, Philippines, Thailand), and the vulnerability of fishers to HIV/AIDS (Thailand). Whereas six countries (China, India, Indonesia, Lao PDR, Thailand, Viet Nam; 42.9 percent) merely comment on such issues, four (28.6 percent) provide more extended discussions with regards to common property resource access of the poor (including fishing grounds), the adverse effects of poor physical infrastructure on fisheries productivity and livelihoods and the role of Cambodian trans-border migrants in Thailand's fish processing industry (Cambodia), the development potential of the coastal strip on the Arabian sea for fisheries and related industries (Pakistan), the government strategy for agricultural and fisheries modernization (Philippines), and environmental issues and fisheries growth potential (Yemen).

EU Strategies for the Asian sub-sample are weaker on fisheries issues with 11 (57.9 percent) documents offering primarily brief remarks related to the sectors contribution to GDP

(Cambodia), fish exports (Lao PDR, Korea, Malaysia, Yemen), environmental issues (Bangladesh, Cambodia, Sri Lanka, Viet Nam), donor support (Bangladesh, Indonesia, Philippines, Sri Lanka), and food security (Lao PDR, Yemen). Only two EU CSPs (10.5 percent) contain deeper discussions regarding the linkages between fisheries and environmental issues (Indonesia and Thailand).

Causal **links** between poverty-related and fishery-related issues were identified by four **CAS** (28.6 percent). Three (14.3 percent) of these go no further than noting the potential contribution of fisheries to the livelihoods of the poor (Philippines, Yemen) and the negative effect of fisheries resources degradation on livelihoods (Bangladesh, Philippines). In contrast, the Cambodian CAS incorporates a somewhat more extensive reflection on the link between common property resource access (including fishing grounds) on the one hand and the livelihood and food security of the poor on the other. Only two **EU** Strategy Papers (10.5 percent) cover causal links by discussing the potential contribution of fisheries to rural livelihoods and food security (Cambodia and Sri Lanka).

In contrast to causal links, fisheries **responses** are slightly better represented in World Bank CAS (five instances; 35.7 percent). The strategies for Bangladesh, the Philippines and Viet Nam (21.4 percent) make only passing remarks to responses, whereas the remaining two documents provide more detail on current or planned interventions in the areas of environmental protection and marine resource management (Indonesia, Yemen).

Six **EU** Strategy Papers (31.6 percent) feature fisheries responses, although half (Bangladesh, Philippines, Viet Nam) offer only minor remarks. The Yemeni paper provides some information on three fisheries related EU projects and stresses that EU aid to the country is aimed at realising the full potential benefits of the Everything-But-Arms-Initiative. The most extensive detail, however, is provided by the discussion of a study to assess potential future EC funded fisheries projects in the Cambodian CSP, and the EC support strategy for an Aquatic Resource Development and Quality Improvement Project in Sri Lanka (Best Practice).

Rather unsurprisingly, given the importance of the sector in the region, aggregate average scores for fisheries inclusion in PRSP and other national policy documents (Box 9) turned out to be slightly higher than those of other regions. That said, scores for individual countries vary considerably – with two documents (Jordan, Nepal) failing to include fisheries issues altogether, a selection of countries offering average coverage (India, Malaysia, Oman, Thailand, Viet Nam), and three countries (Cambodia, Philippines, Sri Lanka) achieving particularly high scores, indicating an extensive coverage of fisheries issues in relation to all criteria. Although overall coverage of fisheries issues compared to other regions is also above average in World Bank CAS and, good in EU CSP, good coverage of the sector in national policy documents does not always translate into high scores in donor documents, as illustrated by the Philippine CSP, for instance.

4.2.5 The transition economies

National policy documents were analysed for thirteen Transition Economies, eight of which have elaborated PRSPs or interim PRSPs. Table 4.11 summarizes our findings (Annex 5 Table 5.A provides a detailed analysis of national policy agendas for each country).

Despite the considerable number of countries without – or with only limited – access to maritime resources in the sample, fisheries issues are incorporated in more than half of the national policy documents (eight; 61.5 percent), an outcome partly explained by the use of EU guidelines for the elaboration of national development plans in accession countries, and their consequent ability to access EU structural funds (including the Financial Instrument for Fisheries Guidance) to promote the development of the sector.

BOX 9			
Country	**NDP**	**CAS**	**CSP**
Bangladesh	***n/a***	0.67	0.67
Bhutan	0.75	--	--
Cambodia	2.5	1.33	2.0
China	n/a	0.33	--
India	1.0	0.33	--
Indonesia	n/a	1.0	0.67
Jordan	--	n/a	--
Korea DPR	n/a	n/a	0.33
Lao PDR	0.5	0.33	0.33
Lebanon	n/a	n/a	--
Malaysia	1.0	n/a	0.33
Mongolia	0.5	n/a	--
Myanmar	n/a	n/a	n/a
Nepal	--	--	n/a
Oman	1.5	n/a	n/a
Pakistan	0.25	0.66	--
Philippines	2.5	1.33	0.67
Qatar	n/a	n/a	n/a
Sri Lanka	***2.25***	--	2.0
Syrian Arab Rep	n/a	n/a	--
Thailand	1.0	0.33	0.67
Viet Nam	1.0	0.67	0.67
Yemen	1.75	1.67	1.0
Average	**1.1**	**0.62**	**0.49**

Table 4.11 Inclusion of the fisheries sector in transition economies PRSPs and National Development Plans

Criteria/Value	1	2	3	*Average*
Issues	Albania, Armenia, Kyrgyzstan	Azerbaijan, Hungary, Lithuania, Slovenia	Estonia	1.077
Links	Albania, Armenia, Estonia, Georgia	Azerbaijan		0.462
Responses	Armenia, Romania	Albania, Azerbaijan, Hungary, Lithuania	Estonia, Slovenia	1.231
Process	Estonia	Albania, Azerbaijan		0.385

* The average is presently computed with reference to the thirteen Transition Economies for which we have PRSPs or NDP. (No National Development Policy could be obtained for ten countries, and the Czech NDP could not be analysed due to technical difficulties).

Three countries (23.1 percent) merely allude to issues relating fisheries to environmental concerns (Albania, Kyrgyzstan) or the development potential of inland fisheries (Armenia, Kyrgyzstan), while five documents (38.5 percent) provide more detailed accounts. Azerbaijan discusses the environmental pollution of the Caspian Sea, and the Hungarian, Lithuanian and Slovenian documents develop more extensive overviews of the state and challenges of the national fisheries sector. Beyond doubt the most comprehensive coverage is provided by the Estonia development plan, which dedicates several pages to a detailed examination of the entire fish production chain, including the volume of fish-stocks, (state and capacity of) the fishing fleet, fishing ports and the fish processing industry and fish export markets (Best Practice).

Causal links between fisheries-related and poverty-related issues are to be found in five national policy documents (38.5 percent) – all but one Poverty Reduction Strategies. Four (30.8 percent) of them only briefly comment on the contribution of fisheries to rural

livelihoods (Albania, Armenia, Estonia), or fish to consumption (Georgia). Only the Azerbaijan PRSP provides more elaborated thoughts, noting that employees in the fisheries sector are among the poorest paid public servants, with incomes below the absolute poverty line, and highlighting the mutually reinforcing relationship between poverty and environmental degradation in the case of the Caspian Sea.

Eight of the thirteen (61.5 percent) documents reviewed offer – in six cases (46.2 percent) elaborated – fisheries responses. Only two countries (15 percent) content their selves in making vague promises to protect fisheries resources (Armenia), to promote fishing cooperatives, and to diversify the food industry by incorporating fish products (Romania). The Albanian document features somewhat more detail on planned interventions (fishery resource management, fisheries and aquaculture promotion, fish processing), as do the Azerbaijan (protection of the Caspian Sea, salary increases for public servants in the fisheries sector), Hungarian (modernization and revitalization of the fisheries sector), and Lithuanian ones (development of marine and interior fisheries, creation of a general fishery information system). The most complete fisheries responses, however – containing detailed accounts of strategies/interventions, as well as targets/monitoring indicators and budgets – are to be found in the Slovenian and Estonian NDPs.

The Slovenian document sets forth a fisheries development programme nested within the overall strategy for agricultural restructuring and rural development, containing two principal lines of action; sustainable resource management, and the promotion of freshwater fish-farming. The Estonian Plan – with the overriding objective of bringing all links in the fish handling chain into conformity with EU food, occupational safety and environmental protection requirements – discusses in great detail (objectives, rationales, activities, target groups, monitoring indicators and targets, financing plan, coordination with other programmes) each of the five fishery-related objectives (Investment support for aquaculture; Investment support for processing of fish and aquaculture products; Promotion of new market outlets; Modernization of fishing ports; Restructuring of the fishing fleet) embraced by the country's rural development strategy (Best Practice).

References to the pro-active involvement of fisheries stakeholders in the process of policy-making and implementation were encountered in only three (23.1 percent) national policy documents. The contribution of the fisheries sector in the drafting of the national development plan is noted in the Estonian NDP, whereas the Albanian and Azerbaijan PRSPs discuss measures aimed at promoting community participation in the management and protection of fisheries resources.

The analysis of donor strategies for the Transition Economies is summarized in Annex 5 (Tables 5.B and 5.C provide a detailed analysis of CAS and EU CSP for each country).

References to the fisheries sector in donor Strategy Papers for Transition Economies are extremely scarce. Fisheries issues are mentioned in only five (26.3 percent) of the available 19 CAS, with the majority (four; 21.1 percent) making only fleeting references to the status of the fishery sector in EU accession negotiations (Hungary, Latvia, Slovenia) or fishery-related environmental problems (Azerbaijan). The Armenian CAS provides a slightly more extended discussion on natural resource depletion (including fisheries). The representation of fisheries issues in EU CSP is even lower (two out of 8 available CSPs; 25 percent). The Russian CSP alludes to Russia's rich fisheries resources and fisheries issues concerning Kaliningrad, whereas the Azerbaijan document offers a more elaborate reference to the environmental problems of the Caspian Sea.

Table 4.12
Inclusion of the fisheries sector in transition economies' World Bank CAS and EU CSPs

Criteria/Value		1	2	3	*Average*
Issues	CAS	Azerbaijan, Hungary, Latvia, Slovenia	Armenia		0.316
	EU	Russia	Azerbaijan		0.375
Links	CAS	Armenia			0.053
	EU				-
Responses	CAS	Azerbaijan, Romania		Albania	0.263
	EU		Russia		0.25

* The average is presently computed with reference to nineteen countries in the case of CAS (five do not have a CAS in the public domain) and eight countries in the case of EU CSPs (no CSP is available for sixteen countries).

The only donor strategy paper referring to causal links between fisheries related and poverty-related issues is the Armenian CAS (5.3 percent), which points out that many poor people are forced by deteriorating socio-economic conditions to overexploit natural (including fisheries) resources.

BOX 10

Country	NDP	CAS	CSP
Albania	1.5	1.0	--
Armenia	0.75	1.0	--
Azerbaijan	2.0	0.67	0.67
Belarus	n/a	--	n/a
Bulgaria	n/a	--	n/a
Czech Republic	n/a	n/a	n/a
Estonia	2.0	n/a	n/a
Georgia	0.25	n/a	--
Hungary	1.0	0.33	n/a
Kazakhstan	n/a	n/a	n/a
Kyrgyzstan	0.25	--	n/a
Latvia	n/a	0.33	n/a
Lithuania	1.0	--	n/a
Macedonia	--	--	--
Moldova	--	--	--
Poland	n/a	--	n/a
Romania	0.25	0.33	n/a
Russian Federation	n/a	--	1.0
Slovakia	n/a	--	n/a
Slovenia	1.25	0.33	n/a
Tajikistan	--	--	n/a
Turkmenistan	n/a	n/a	n/a
Ukraine	n/a	--	--
Uzbekistan	n/a	--	n/a
Average	**0.79**	**0.21**	**0.21**

Average scores for the Transition Economies – rather unsurprisingly in the light of the above analysis – are poor (Box 10), particularly in the case of donor strategies (CAS/ CSP), with the lowest scores among all the regions examined. Sixteen of the nineteen available CAS (84.2 percent) either fail to include the sector altogether or provide a very fleeting reference. Only the Albanian and Armenian documents address fisheries issues somewhat more extensively. EU Country Assistance Strategies – available for only eight transition economies – mentions the sector in just two instances (25 percent).

Although national policy documents score slightly better, the low importance assigned to the sector is evident in most of the documents. Notable exceptions are the Azerbaijan PRSP and the Estonian Development Plan, with average scores denoting extended references to fisheries in relation to two or more criteria.

4.2.6 Small Island Developing States (SIDS)

There is a strong likelihood – given their topographic characteristics – that SIDS, surrounded as they mostly are by vast expanses of water and with correspondingly large EEZs, are more economically and socially reliant upon maritime activities (most notably fishing) than mainland economies in either Africa, Asia, Latin America or Europe. Unfortunately this geographic isolation has not been fully surmounted by electronic technology, and ready

access to key national development data and strategies is somewhat circumscribed. So, while we have been able to identify the key national policy documents for thirty-five (85.4 percent) of the forty-one SIDS highlighted in Annex 6[43], we have only been able to retrieve eleven of the thirty-five (31.4 percent) – a respectable sub-sample nevertheless. Table 4.13 below summaries our findings (Annex 6 provides more detailed information on the respective documents).

All countries in our sub-sample refer, in one way or another, to fisheries related issues in the analysed documents, although the majority (eight, 72.7 percent) only do fleetingly. Fleet growth (actual or intended) is the reference point in the Samoan and Mauritian documents, the forex importance of fisheries is noted in the Interim PRSP of Guinea-Bissau, the Cook Islands Budget Policy Statement refers to recent landings growth (though also comments on the low value-added presently created within the sector), while the Bahamian Budget Communication identifies the sector as one of the six pillars of the economy.

In contrast, the Guyanan PRSP sees fisheries as not being central to the national development plan, the PRSP of Sao Tome and Principe merely cautions against coastal overfishing, and *the St. Lucian Interim Poverty Reduction Strategy and Action* Plan proposes a need for agricultural diversification – which includes fisheries. Issues are more explicitly addressed in the *Programa do Governo 2001–5* of Cape Verde, with fisheries size and forex importance being discussed (along with views for the sustainable and productive exploitation of the sector) and Vision 2018 of the Marshall Islands – which contrasts the pressures emerging on local reef fisheries (as a consequence of the aquarium trade) with the present inability to fully exploit the resource rent opportunities incumbent within an EEZ of over 2 million square kilometres.

Table 4.13
Inclusion of the fisheries sector in the NDPs of Small Island Developing States (SIDS)

Criteria/Value	1	2	3	Ave.
Issues	Bahamas, Cook Is., Guinea-Bissau, Guyana, Mauritius, Samoa, St. Lucia, São Tome and Príncipe	Cape Verde, Marshall Is.	Fiji, Maldives	1.5
Links	Fiji, Guyana, St. Lucia, Marshall Is.	Maldives		0.5
Responses	Cook Is., Guinea-Bissau, Mauritius, Samoa	Cape Verde, Marshall Is.	Fiji, Maldives	1.17
Process	Fiji, Guyana, St. Lucia, Marshall Is.		Maldives	0.58

* The average is presently computed with reference to the twelve SIDS for whom we have NDPs/strategies.

The most comprehensive coverage of fisheries issues however is be found in the *Strategic Development Plan 2003–5* (SDP) of Fiji and the *Sixth National Development Plan* 2001–5 (6NDP) of the Maldives. Marine resources – with the goal of encouraging the sustainable

[43] The exceptions are Aruba, Bahrain, Cuba, Haiti, Singapore and Tokelau (for which there are no Bank CAS or EU CSP available either).

utilization and development of marine and fisheries resources – are accorded their own sub-section in the Fijian Plan, tuna operations and international/regional obligations are discussed, and current constraints and opportunities are identified. Even better is the Maldives document. Having pinpointed the country's dependence on fisheries (and tourism), the Plan then goes on to enunciate twelve clear issues (overexploitation of exotic reef species, increased landings of poor quality fish, inadequate local technical expertise in production technologies etc.) which pre-occupy sectoral planners (Best Practice).

Causal links, as in the other regional areas, are less adequately addressed (five countries, 41.7 percent). Poverty identification is the basis of the Fijian contribution, the 2003–5 Plan noting the high (90 percent) contribution of fisheries to the subsistence of local communities, while the St Lucian and Guyanan documents relate to processes of poverty alleviation. St Lucia notes – though fails to specify – the role of the Soufriere Regional Development Foundation in contributing to poverty reduction in fisheries, as does the Marshall Islands document with regard to aquaculture/mariculture in general, while Guyana notes the necessity of private involvement in the post-harvest sector if incomes are to be sustained or improved. The Maldives goes a little further, combining identification (noting the link between declines in fisheries exports and national poverty levels) with alleviation (Policy Goal 19 – ensure sustainable socio-economic development of fishing communities).

Despite the unanimous recognition of fisheries issues in the documents analysed, rather less (eight, 66.7 percent) articulate **responses.** The Cook Islands assigns an undisclosed amount to support the sector, increasing fiscal exemptions to ensure a "harvest-friendly" regime. The Samoan document is equally unforthcoming about the amount of funds assigned to purchase fishing aggregate devices (FAD), the IPRSP of Guinea-Bissau fails to disclose any of the contents of an impending Fisheries Law, while the Mauritian *National Strategy for Sustainable Development 1999–2005* only provides a cursory reference to some of the objectives of the Ten Year Fisheries Development Plan. More detail is encompassed within the Cape Verde *Progama do* Govierno and the Marshall Islands *Vision 2018,* which identify eight and five enabling policy measures (promote external investment, reconsider the role of the state etc.) respectively in order to enhance the contribution of the sector.

Best practice – although in these instances the responses are not costed – is to be found in the Maldives and Fijian documents, however. Fiji's SDN identifies four fisheries policy objectives (sustainable development, promote production and export of value-added products, increased community participation through ownership of companies, and provide appropriate institutional/physical infrastructure) – and the Maldivian 6NDP four key policy areas (promote diversification, increase private participation, manage sustainably, and to ensure the socio-economic development of fishing communities). Each document than elaborates a series of strategies (Maldives) or key performance indicators (Fiji) to ensure compliance with the underlying policy objectives (Best Practice).

The documents analysed appear to be a little weak on **process** though (five countries, 41.7 percent). The Guyanese document merely suggests (in Annex 6) that poverty reducing public spending will be tracked via aquaculture development in the country's artisanal fisheries, though no details are given as to how. The Marshall Islands promises to establish community fishing centres – although the role they are to play in the policy formulation process is left undisclosed. No details either are given either on the precise way the fisheries sector is involved – notwithstanding claims regarding its participation – in the formulation of the St. Lucian policy document, nor in the Fijian Plan that promises to "facilitate the active

participation and involvement of resource owners in the mainstream activities of the industry by 2003 (SDN, 2002: 27)." Once more, the Maldives excels. Strategies detailed under Policy 19 – ensuring the sustainable development of rural fishing communities through greater devolution of resource management authority – highlights six strategies designed to foster (and maintain) greater participation in the decision-making process by rural fisherfolk and promote good governance within the sector (Best Practice).

Table 4.14 Inclusion of the fisheries sector in SIDS CAS and EU Strategy Papers

Criteria/Value	1	2	3	Ave.
Issues – CAS	Belize, PNG, Trinidad & T.		Maldives	0.67
EU	Antigua, Bahamas, Cape Verde, Comoro Is., Cook Is., Dominica, Guyana, Jamaica, Niue, PNG, St. Vincent, São Tome and Príncipe, Suriname, Tonga.	Barbados, Grenada, Guinea-Bissau, Kiribati, Marshall Is., Mauritius, Micronesia, Nauru, Palau, St. Kitts, Samoa, Seychelles, Solomon Is., Tuvalu.	Maldives, St. Lucia.	1.41
Links – CAS	Jamaica, Maldives	Belize		0.44
EU	Cape Verde, Cook Is., Dominica, Niue, St. Lucia, Samoa, Solomon Is., Tonga, Tuvalu.	Belize.		0.32
Responses – CAS	São Tome and Príncipe.	Maldives		0.33
EU	Bahamas, Barbados, Belize, Cape Verde, Cook Is., Kiribati, Maldives, Mauritius, Niue, Palau, PNG, Solomon Is.	Guinea-Bissau, São Tome and Príncipe	Seychelles	0.56

* The average is computed with reference to thirty-four countries for the EU Strategy Papers (no Strategy Papers are available for Aruba, Bahrain, Cuba, Fiji, Haiti, Singapore and Tokelau), and with reference to the nine countries that have a CAS document in the public domain.

There is a marked disparity in the availability of **donor support strategies** – while we have thirty-four EU CSPs, just nine (of which three – Cape Verde, the Dominican Republic and Guyana fail to mention the fisheries sector whatsoever) CAS are available for analysis (Table 4.14). Of these nine **CAS documents**, four (44.4 percent) raise fisheries related **issues**. In the case of the Belize and Papua New Guinea it is with reference to the comparative advantage in fisheries (PNG) or aquaculture growth prospects (Belize), while the Trinidadian CAS contents itself with alluding to government programmes to support fisheries and aquaculture. The Maldives' CAS is more effusive, noting the strategic nature of the sector vis-à-vis

contribution to the national economy and the potential for future fisheries growth if key identified policy and institutional constraints are addressed (Best Practice).

A plethora of **EU CSPs** (30, 88.2 percent) pay heed to fisheries issues. Of those which purely signal such issues (fourteen, 41.2 percent), the identified concerns relate to; recent fisheries growth (Aruba, Cape Verde) and/or the need to exploit the full potential of the country's fisheries – including niche markets (Bahamas, Dominica, Jamaica, PNG, Sao Tome and Principe, and Tonga), the sector's contribution to the local economy (Guyana, Niue), donor support (Aruba, PNG, St. Vincent, Sao Tome and Principe), hygiene failings (Cape Verde and St. Vincent), and concerns about the resource base (Aruba, Bahamas) and inappropriate fishing techniques (Comoro Islands).

Specific preoccupations are mentioned in the Bahamian (problems of fish poaching) and Niue (lack of local landing facilities) CSPs. A further fourteen countries acknowledge a similar broad range of issues, albeit treating them in rather more depth. These include, for example, the Seychelles – which highlights the need for stock protection measures and the need to reconcile fisheries, tourism and environmental objectives – and the Marshall Islands – which provides details on the country's coastal and oceanic fisheries and the benefits obtained under the 1997 National Fisheries Policy and the accompanying licence regime.

License fees, fisheries growth and the governmental involvement therein, also feature highly in the Kiribati, Micronesia and Tuvalu CSPs précis of each country's fisheries development. More details on the contents of the fisheries issues advanced by those other nine countries garnering a mark of two are contained in the Annex 6.C. The best exemplars of integrating fisheries issues into donor strategy documents provided by our regional survey are to be found in the Maldives and St. Lucia CSPs. The latter offers a succinct sectoral overview, pointing out how it's failure to presently gain HACCP certification is hampering development before going on to delineate the aims of the STABEX-funded fisheries development programme. The former also emphasizes a challenge – insofar as the impending graduation from ACP status is likely to have a profound impact on tuna exports to the EU – as well as providing general background details on the sector's importance in the national schema of things (Best Practice).

Linkages between poverty and fisheries were apparent in ten (29.4 percent) of the **EU CSPs.** Efforts to link fisheries with poverty (poverty identification) are alluded to in the Cook Island (reef/lagoon fishers have subsistence lifestyles), Dominica (income provider and livelihood for 2,000+ fishers) Niue, Samoa (such subsistence activities have declined over time), the Solomon Island (artisanal fisheries are an important source of rural income and protein) and Tuvalu (fishing – amongst others – is a subsistence activity) CSPs. In contrast, both the Tongan (access to resources – including fishing rights and land) and Cape Verde (fishing is the ultimate free resource for the most vulnerable) documents pinpoint potential reasons as to how fisheries – or access thereto – may assuage/exacerbate poverty (poverty alleviation).

The St. Lucia CSP, in a similar vein, notes the government intent to achieve self-sufficiency in fish and other basic foodstuffs. One CSP (2.9 percent) is a little more forthcoming on such linkages. The Belizean strategy quotes a 1996 Country Poverty Assessment which indicated the main source of income for 45 percent of the poorest quintile was derived from agriculture and/or fishing – before drawing a link between agriculture (not fisheries unfortunately) and poverty. Linkages in **CAS** reports number three. The Jamaican Country Programme Matrix notes that the rural poor are farmers and fishers, the Maldives paper notes fishing to be a

principal source of livelihoods and nutrition for much of the atolls' population, and Belize CAS recounts the quintile statistic mentioned above – but then neglects to finger fishers as a clearly identifiable group exposed to poverty in the rural areas – before referring to the increasing numbers of the poor who indulge in fishing as a livelihood option.

A small number (two) of fisheries-related responses are to be encountered in the CAS briefs. The Sao Tome and Principe CAS contains a promise, nothing more, to fund a study on the fisheries sector, while the Maldives CAS details past Bank support and ongoing assistance programmes for the sector. Fifteen (44.1 percent) of EU CSPs report fisheries related responses. These range from providing support to; improve sanitary processes (Bahamas), upgrade fishing facilities (Barbados), aquaculture development (Belize), unspecified local development imperatives (Cook Islands), enhance local management capacities (Bahamas), purchase new boats (Kiribati), fish inspection project (Maldives), small regional fisheries centres (Solomon Islands) and ensuring coherence between EU tuna harvesting interest and national development objectives (Niue, Papua New Guinea).

Unfortunately, such responses are merely noted – rather than elaborated upon – as is also the case with EU Fishing Agreements (current, past and intended) signed with Cape Verde, Mauritius and Palau. While the Guinea-Bissau and Sao Tome and Principe CSPs are a little more forthcoming with regard to details on EU Fishing Agreements, the most comprehensive response tabulated to sectoral issues can be found in the Seychelles document. Aside from a review of EU – Seychelles Fishing Agreements, the CSP suggests potential avenues for future collaboration (formulation/implementation of a sectoral strategy, capacity-building, fish-processing), pending local requests – and recognizes the need to ensure coherence between such initiatives and EC development co-operation policies in related fields via permanent policy monitoring (Best Practice).

BOX 11

Country	NDP	CAS	CSP
Antigua	N/a	N/a	0.33
Aruba	N/a	N/a	N/a
Bahamas	0.25	N/a	0.7
Bahrain	N/a	N/a	n/a
Barbados	N/a	N/a	1.0
Belize	N/a	1.0	1.7
Cape Verde	1.0	-	1.0
Comoro Is.	N/a	N/a	0.33
Cook Is.	0.5	N/a	0.7
Cuba	N/a	N/a	n/a
Dominica	N/a	N/a	0.7
Dominican Rep.	N/a	-	-
Fiji	2.0	N/a	n/a
Grenada	-	N/a	0.7
Guinea-Bissau	0.5	N/a	1.3
Guyana	0.75	-	0.33
Haiti	N/a	N/a	n/a
Jamaica	N/a	0.33	0.33
Kiribati	N/a	N/a	1.0
Maldives	2.75	1.7	1.33
Marshall Is.	1.5	N/a	0.7
Mauritius	0.5	N/a	1.0
Micronesia	N/a	N/a	0.7
Nauru	N/a	N/a	0.7
Niue	N/a	N/a	1.0
Palau	N/a	N/a	1.0
Papua NG	N/a	0.33	0.7
St. Kitts	N/a	N/a	0.7
St. Lucia	0.75	N/a	1.33
St. Vincent	-	N/a	0.33
Samoa	0.5	N/a	1.0
Sao Tome & Principe	0.25	0.33	1.0
Seychelles	N/a	N/a	1.7
Singapore	N/a	N/a	n/a
Solomon Is.	N/a	N/a	1.33
Suriname	N/a	N/a	0.33
Tokelau	N/a	N/a	N/a
Tonga	N/a	N/a	0.7
Trinidad & T	N/a	0.33	N/a
Tuvalu	N/a	N/a	1.0
Vanuatu	N/a	N/a	n/a
AVERAGE	**0.94**	**0.44**	**0.77**

Aggregate average scores (Box 11), are relatively high (as was to be expected), although once more there was a marked divergence – Fiji and the Maldives scoring particularly strongly compared to Sao Tome and Principe and Samoa, where fisheries scarcely merit a mention. EU CSPs similarly recognize the importance of fisheries-related issues for the SIDS, this being reflected in a rather higher average score (0.77) thanks to the variety of initiatives – not just bilateral Fishing Agreements – being proposed or undertaken in such states.

It is clear then that the extent to which the fisheries sector is mainstreamed into national development discourses (whether in the form of PRSPs or other, more traditionally generated, national development strategies) and donor support schemes vary across, and within, regions. While countries such as Cambodia, Cameroon, Estonia, Fiji, Guinea, Malawi, the Maldives, Morocco, Peru, the Philippines and Senegal score highly[44], the sector fares markedly worse in other countries. One reason for this variation may lie in the relative importance of the sector as an established "motor of growth" or, alternatively, as a "harbour of poverty" as identified in Section Three of this report. The final, and concluding, section therefore compares the extent to which the sector has been incorporated (Section 4) with the outcomes expected if the socio-economic importance of the sector to the national economy were to be taken into account (Section 3).

5. CONCLUSIONS

The September 2000 Millennium Development Compact and the subsequent 2002 Monterrey Consensus (emanating from the UN Financing for Development Conference) call for concerted action on the major developmental challenges of the day. A central concern is human poverty (MDG–Goal 1) – as fifty-four countries are poorer, twenty-one have more people going hungry, thirty four have seen life expectancy decline and the Human Development Index has fallen in twenty-one since 1990 (World Bank, 2003: 2). In 2000, 1100.2 million people – 21.6 percent of the global population – survived on less than US$1.08 a day, with the numbers falling below this benchmark growing markedly in most regions of the world since 1990[45]. Poverty is likely to remain a crucial – if not the fundamental – policy objective in the international development discourse then.

This increased international preoccupation with poverty has manifested itself in the emergence of PRSPs, completion of which is obligatory for low-income countries intent on accessing IMF and/or World Bank concessional lending facilities. These participatory country-owned policy documents, which are "expected to be framed against the backdrop of the MDGs" (IMF, 2003:4), should contain clearly presented and costed macroeconomic, structural and social policy priorities to alleviate poverty – along with a series of intermediate and final targets, associated indicators, and the intended monitoring systems. They also provide a framework for improved coordination of development efforts; Country Assistance Strategies devised by the Bank being expected to temporally follow (and be based upon) nationally produced PRSPs, bilateral aid programmes of the USA, UK and Germany (to name but three) being in concordance with the aims, objectives and policy initiatives proposed in such documents, and EU Country Strategy Papers complementing the same.

Elsewhere (in countries not under the constraint of having to produce a PRSP), developmental objectives are identified, targets set and monitoring systems agreed within the framework of NDPs (case of Peru, Botswana, Thailand, Bulgaria, and Antigua), Medium Term Economic and Financial Strategies (case of Gabon, Belize), Government Programmes

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[44] "Highly" is defined here as scoring a maximum (=3), on at least two criteria (in either NDP, CAS or CSP).

[45] In sub-Saharan Africa the numbers rose from 81.9 million to 322.9 million (up 34 percent); in the Middle East and North Africa by 3.1 million to 8.2 million (60.8 percent); in Latin America by 7.2 million to 55.6 million (14.9 percent); and in East Europe and Central Asia by 13.6 million to 19.9 million (215.9 percent). Successful diminutions were only apparent in East Asia (including China), where numbers fell from 208.7 million to 261.4 million (down 44.4 percent), and in South Asia – down 34.4 million to 432.1 million (7.4 percent) (World Bank, 2003a).

(case of Chile, Equatorial Guinea, Ukraine, and Cape Verde), or similar[46]. **The question is, how does/can fisheries be integrated into this framework of nationally owned development programmes and complementary donor support programmes?**

We contend the sector can – in certain countries – have a particularly important role to play in the national development process on two counts. First, in terms of its value as a motor of growth and/or improved domestic nutritional uptake. The establishment of 200-mile exclusive economic zones (EEZs) and a development doctrine (neo-liberalism) that espoused the exploitation of natural comparative advantage prompted fleet expansion and the development of aquaculture across the developing world (Thorpe and Bennett, 2001:147ff). Fisheries growth – to the point where the developing economies now supply more than 70 percent of total fish for food production (IFFPRI, 2003:4) – was reflected in a growing aquatic resource contribution to GDP, exports and domestic nutrient availability in a number of countries. Equally (second), fisheries is a potential beneficiary of the new poverty-oriented development programmes in those instances when individuals, groups and communities linked to the sector are identified as inherently poor and/or latently vulnerable. These criteria then provide a convenient basis for identifying – and thereby differentiating between – countries according to the relative importance of their respective fisheries sectors in development terms (Table 5.1)

Fisheries appears to be significant as a motor of growth within forty-four states, mainly drawn from the African (7 PRSP states, 5 other states), Asian (12 cases) and SIDS (15 cases) regions. Although the sample is much reduced (sixty-three countries) for the equity scatter-grams, seventeen states – largely from Africa and Asia (seven cases apiece) – exhibit pronounced levels of rural poverty and fisheries-related employment, with twelve countries acknowledged under both criteria. **The question is though – does sectoral significance in growth and/or equity terms translate into a more effective mainstreaming of fisheries into national development agendas and donor support programmes?** (and, conversely of course, is the sector relatively neglected in those countries with a negligible – or less important (at least in terms of our analytic criteria) – fisheries sector?).

To this end, PRSPs, NDPs and World Bank and EU donor support programmes for a large sub-set of developing countries were obtained and subjected to detailed analysis. Four assessment criteria were identified; Issues, Causal Links, Responses and Processes (see Box 5 earlier):

Fisheries Issues: Many of the national policy documents acknowledged the size of the sector and its present (or potential) contribution to GDP, exports, earnings and employment. Concerns about the sustainability of current fishing levels or practices were frequently aired, and the need for improved territorial control/surveillance mechanisms and institutional coordination also featured highly. Country-specific issues such as the; conflict-induced slump in inland fisheries production (Sierra Leone) and effects of war (Sri Lanka), EU bans on fish exports (Uganda), effects of the shrimp white spot virus (Venezuela), the invasive nature of water hyacinth (Rwanda), eco-tourism oriented fly-fishing opportunities (Bhutan) and the strategic significance of Lake Sevan (Armenia) were also mentioned. Peru and Estonia go as far as to produce a SWOT analysis of the sector, the Cameroon, Fiji and Senegal, Cambodia

[46] Comoros Islands policy, for example, is drawn from the Reconstruction and National Reconciliation Programme, St. Vincent and the Grenadines from the Annual Budget Address, and Brazil from a Pluri-annual Plan.

and Philippines identify sectoral constraints and potential, while the Maldives enunciates twelve clear issues which are pre-occupying planners.

By and large, the donor support documents reflected similar issues as we might expect – albeit with a more pronounced "commercial" emphasis in the EU CSPs on impediments to growth (c.f. Angola), trade (Peru, Malaysia) and foreign investment in the sector (Brazil), past programmes of reciprocal cooperation (Argentina), local licensing regimes (Kiribati), consequences of losing ACP – or regaining GSP – status (Maldives and Thailand respectively), and the extent of donor support for the sector (Eritrea). The CAS cover similar ground, although choose to; highlight the sector's comparative advantage (PNG) and proposed modernization (Philippines), underline past structural reforms (Mauritania), detail port privatization (Tunisia) and mention fraud – vis-à-vis licence distribution (Madagascar).

Causal Links: Emphasis on causal linkages between fisheries and poverty-related issues was much more superficial – even in the case of those economies producing PRSPs – and tended to allude to, rather than analyse such, linkages. Hence the fisheries sector is seen as underpinning subsistence lifestyles and providing low incomes, or mention (unelaborated) is made as to the role the sector could play in alleviating poverty and vulnerability. Some documents (Burkina Faso, Malawi, Azerbaijan, Philippines) signal the association between poverty and environmental degradation – most notably through overfishing. The majority of such references relate to poverty identification – the best being the Belizean and Ghanaian which uses micro-economic household data to identify traditional fishers as being extremely poor – with less emphasis being given to considerations which attempt to tackle such linkages (poverty alleviation). Examples of the latter include; the proposed plan to encourage fish consumption (Peru), the need to gain an improved EU Agreement (Mauritania), generate gainful employment (India), and the need to overcome resource access constraints (Cambodia and Tonga).

The Cameroon PRSP is the most expansive in identifying said linkages, extending from comments made in the round-robin of participatory meetings through to the highlighting of fisheries-related constraints which presently frustrate the alleviation of poverty.

Donor programmes are similarly bereft of such references. The most detailed responses are to be found in the Venezuelan and Guinean EU Country Strategy Papers and both the Belizean EU CSP and the World Bank CAS. Yet even where such reflections do appear, they are more related to identifying – than alleviating – fisheries-related poverty. **This relative failing – of both NDPs and donor support programmes – merits highlighting insofar as such "benign neglect" could unintentionally sponsor the design and implementation of aquaculture and/or fisheries development policies that exacerbate poverty rather than help reduce it.**

Responses: A wide array of policy responses are noted in the documents encompassing the; creation of marine parks, construction of new landing facilities/harbours, provision of improved fisheries information, provision of fishing inputs, upgrading of health and sanitary procedures, improvement of surveillance systems, establishment of new processing centres, approval of new fisheries laws and institutional arrangements, development of aquaculture, along with capacity-building, tariff reform and specific interventions targeted at impoverished fisheries (and other) groupings. The best of the responses – and there tend to be

rather more under this criteria than under the other analysed criteria[47] – provide detailed strategies/activities to be undertaken AND costings/monitoring indicators of the proposed interventions.

Table 5.1 Countries in which fisheries is highly significant in both trade and consumption and/or employment and poverty terms[48]

Region	Both	Trade/consumption only	Employment/rural poverty only
1. Latin America		Peru, Venezuela.	Ecuador, Panama.
2. Africa – PRSP states	Ghana, Madagascar, Senegal, Sierra Leone.	Guinea, Mozambique, Tanzania.	Chad.
3. Africa – Others	Tunisia	Angola, Republic of Congo, Gabon, Morocco.	Nigeria.
4. Asia	Bangladesh, Cambodia, India, Indonesia, Philippines, Sri Lanka, Viet Nam.	China, Korea, Myanmar, Thailand, Yemen.	
5. Trans. Econ.		Estonia, Latvia, Russia	
6. Small Island Developing States (SIDS)		Belize, Cape Verde, Cuba, Fiji, Grenada, Guyana, Haiti, Kiribati, Maldives, Mauritius, Papua New Guinea, Sao Tome, Seychelles, Solomon Is., Tonga.	Trinidad and Tobago

Affirmative donor responses are dependent upon whether the EU or World Bank has – or is in the process of formulating – a Fisheries Agreement or support programme for the country concerned. Hence, while Chile – the world's sixth largest fishing nation in terms of landings in 2001 – scores poorly on this count, Argentina (world's twenty-fourth fishing nation) scores more highly given its ongoing Bank project on sustainable fisheries management (case of CAS), and EU scientific and technical cooperation agreement.

Process: In the main, links between sectoral stakeholders and the document formulation process extended to no more than consultation with stakeholders so as to allow the voicing of their concerns. There were few obvious connections between voiced stakeholder demands

[47] This can probably be attributed to the fact that the majority of instances of best practice in this case are derived from countries which have produced PRSPs – documents which (generally) oblige governments to produce a detailed, and costed, policy implementation matrix.

[48] Fisheries is deemed as being "highly significant" in those countries whose trade/consumption and/or rural poverty/employment coordinates fall within the north-east quadrants of the respective regional scatter-grams (see Figures 3.3 to 3.14).

and the ensuing policy analysis and/or response – as evidenced in the Mozambican and Ivory Coast PRSPs, for example. In contrast, the more effective policy documents not only accorded stakeholders a bigger influence within the ongoing consultative process, but also pledged to create new institutional mechanisms intended to increase the community and/or sectoral voice in subsequent policy-making (c.f. the Guinea, Malawi, Maldives and Sri Lanka documents).

In the course of having analysed 281 national or donor support strategies[49], two issues particularly stand out – given their relative omission. First, and rather worryingly, any pretence towards promoting an engendered approach to fisheries mainstreaming is only apparent in the Ghanaian and Cambodian (and to a lesser extent the Lao PDR, Malian, Malawian and Cape Verdean) national policy documents, despite the marked demarcation of the sector in gender role terms. *Further research could usefully be directed then to linking the critical role women play within the fisheries supply chain in many regions of the developing world to the fisheries development discourse which feeds into national and donor support strategies – so as to ensure the more effective promotion of pro-poor, pro-gender policies.* **Second,** despite wide-ranging efforts by FAO to promote "a framework for national and international efforts to ensure the sustainable exploitation of aquatic living resources in harmony with the environment" via the Code of Conduct for Responsible Fisheries (CCRF, Preface) just one – the Eighth Malaysian Plan 2001/5 – makes explicit reference to the Code. *It seems imperative then to formulate a series of guidelines which could enable the key elements of the Code to be integrated more effectively into macroeconomic planning, poverty alleviation strategies and donor support programmes.*

To facilitate comparison, a four-point scale (0–3) was used to rank the analysed documents on the above four criteria – with an absence of fisheries references in the document meriting a zero mark, whilst identified "best practice" gained the maximum three. Table 5.2 highlights those countries adjudged to provide examples of "best practice – whether in the case of PRSPs or NDPs, or donor support programmes.

Table 5.2 Summary of Identified Best Practices

Criteria	PRSPs/Nat. Dev. Plans	Bank CAS and EU CSPs
Issues	Peru, Cameroon, Morocco, Estonia, Cambodia, Oman, Philippines, Fiji, Maldives.	Gambia, Guinea, Senegal, St. Lucia (all EU), Maldives (Bank and EU)
Links	Cameroon.	
Responses	Peru, Ghana, Guinea, Malawi, Mauritania, Senegal, Morocco, Estonia, Slovenia, Cambodia, Philippines, Oman, Yemen, Fiji, Maldives.	Cambodia, Sri Lanka, Venezuela and Seychelles (EU), Albania (World Bank)
Process	Guinea, Malawi, Sri Lanka, Maldives.	

In total, seventeen countries provided examples of best practice in their PRSPs or NDPs, primarily in terms of identifying fisheries-related issues and responses. In

[49] Eighty-five PRSPs or principal national development strategy documents, eighty World Bank CAS and 116 EU CSPs were analysed.

general, those that scored highly on the issues criteria also exhibited best practice on the response front. Only the Cameroon scored highly in tracing out causal links between the fisheries sector and poverty, with four countries successfully incorporating the sector into the policy-making process. The Maldives offer the most examples of best practice (three).

Ten donor support strategies provide instances of best practice, with the sector appearing to be more effectively mainstreamed into EU CSP (nine – from a sample of 116) than World Bank CAS (two – out of eighty) papers. While no country appears under more than one criteria, the Maldives is identified as an example of best practice vis-à-vis fisheries issues in both donor support documents.

Mapping this analysis across to the earlier scatter-gram plots indicating the relative importance of the sector in trade/consumption and poverty/employment terms, throws up a number of intriguing happenstances. First, although the fisheries sector is deemed to be highly significant in either trade/consumption and/or poverty/employment terms in forty-nine countries (sixteen SIDS, twelve Asian, fourteen African – eight PRSP and six non-PRSP, four Latin American and three transition states)[50], such significance only translates into effective sectoral mainstreaming[51] in twelve (44.4 percent of accessed) PRSPs/NDPs (Cambodia, Estonia, Fiji, Ghana, Guinea, the Maldives, Morocco, Peru, the Philippines, Senegal, Sri Lanka, the Yemen) and seven (17.5–18 percent of accessed) donor support programmes (Cambodia, Guinea, the Maldives, Senegal, the Seychelles, Sri Lanka and Venezuela)[52]. Five of these (Cambodia, Ghana, Guinea, Senegal and Sri Lanka) have produced PRSPs. **Second,** there is a slightly larger group of fifteen (55.6 percent) countries – Venezuela, Ecuador, Panama (Latin America), Chad, Madagascar, Mozambique, Sierra Leone and Tanzania (Africa), India, Thailand and Viet Nam (Asia), and Cape Verde, Guyana, Mauritius and São Tome and Príncipe (SIDS) for whom the sector is significant, yet this is not properly reflected in contemporary PRSP/NDPs and/or donor support strategies (nine of these having produced PRSPs). Indeed, with the exception of Madagascar and Mozambique, analysis of the NDP of each of these countries registered an aggregate average individual score of unity or less. Reasons for such a disparity are not immediately clear. **Third,** there is another sub-set of four countries – Cameroon, Malawi and Mauritania (Africa), and Slovenia (Transition Economies) – who have managed to effectively mainstream fisheries into PRSPs/NDPs, despite the sector being relatively less/un important in trade/consumption and/or poverty/employment terms[53].

In conclusion, ***three possible avenues for future research into the more effective incorporation of the fisheries sector into national development and poverty reduction strategies, policies and programmes suggest themselves. First,*** *a detailed analysis of the identified examples of best practice so as to produce a synthesis of "best" best practice (as it were) to inform future efforts intent on mainstreaming the sector into PRSPs/NDPs and*

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[50] Trade/consumption and poverty/employment figures were unavailable for Oman.

[51] Effective sectoral mainstreaming is equated, in this instance, with recording best practice under one or more of the assessment criteria identified.

[52] The relevant PRSPs/NDPs were inaccessible for twenty-two (Angola, Bangladesh, Belize, China, Congo Republic, Cuba, Gabon, Grenada, Haiti, Indonesia, Kiribati, Korea, Latvia, Myanmar, Nigeria, Papua New Guinea, Russia, the Seychelles, Solomon Islands, Tonga, Trinidad and Tobago, and Tunisia), and the donor support programmes for nine-ten (Cuba, Estonia, Fiji, Haiti, Mali, and Myanmar – both CAS and CSP; Latvia, Nigeria and Trinidad and Tobago – case of CSP, and Kiribati, Mauritius, the Solomon Island and Tonga – case of CAS) mainly SIDS, of the forty-nine countries.

[53] In the case of donor support programmes, there are two instances (Gambia and St. Lucia) in the case of EU CSPs, and one (Albania) with regard to Bank CAS.

donor support programmes. ***Second****, a comparative study examining why certain countries with significant (in either trade/consumption and/or poverty/employment terms) fisheries sectors such as Venezuela, Mozambique, Thailand and Cape Verde have nevertheless, in effect, "missed the opportunity" to date to ensure more effective fisheries mainstreaming into national development discourses – in contrast to Peru, Ghana, Cambodia, and the Maldives (where significance has been translated into best practice).* ***Third,*** *a further comparative study identifying the local institutions and policy-making processes which have allowed countries where the sector is relatively unimportant in trade/consumption and/or poverty/employment terms such as Cameroon and Slovenia to "punch above their weight", and thereby "create opportunities" for greater sectoral inclusion in national agendas.*

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Annex 1

Countries included in scatterplot analysis

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Latin America							
Argentina	ARG	SW	6.5	3.6	-	0.1	-
Bolivia	BOL	SW	0.0	1.7	NW	0.2	81.70
Brazil	BRA	SW	1.8	3.9	NW	0.4	41.50
Chile	CHL	SE	38.5	9.0	SW	0.8	14.70
Colombia	COL	SW	6.1	4.5	NW	0.7	31.20
Costa Rica	CRI	SW	6.5	4.7	NW	0.4	25.50
Ecuador	ECU	SE	30.7	8.0	NE	3.3	47.00
El Salvador	SLV	SW	4.1	4.1	NW	0.9	55.70
Guatemala	GTM	SW	2.2	3.6	NW	0.4	71.90
Honduras	HND	SE	10.5	2.8	NW	0.9	51.00
Mexico	MEX	SW	8.5	6.8	-	0.6	-
Nicaragua	NIC	SE	23.9	8.4	NW	0.7	76.10
Panama	PAN	SE	44.3	6.9	NE	1.1	64.90
Paraguay	PRY	SW	0.0	3.5	NW	0.2	45.30
Peru	PER	NE	62.2	20.0	NW	0.7	64.70
Uruguay	URY	SW	9.9	4.4	-	0.4	-

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Venezuela	VEN	NE	33.4	15.9	NW	0.4	73.10
Africa: PRSP States							
Benin	BEN	NW	1.5	18.3	-	2.2	-
Burkina Faso	BFA	SW	0.1	5.0	NW	0.2	50.70
Cameroon	CMR	NW	1.1	32.0	NW	0.4	32.40
Central African Republic	CAF	SW	1.8	8.2	-	0.3	-
Chad	TCD	NW	0.0	15.0	NE	8.3	67.00
Congo, Democratic Republic	ZAR	NW	1.4	43.6	-	0.5	-
Côte d'Ivoire	CIV	NW	6.3	37.4	-	0.3	-
Djibouti	DJI	SW	0.9	2.3	NW	0.0	86.50
Ethiopia	ETH	SW	0.0	1.6	NW	0.0	45.90
Gambia	GMB	NE	43.9	56.9	-	0.3	-
Ghana	GHA	NE	12.3	65.8	NE	2.4	34.30
Guinea	GIN	NE	58.3	47.1	-	0.3	-
Kenya	KEN	NW	3.7	11.0	NW	0.4	46.70
Lesotho	LSO	-	-	1.4	NW	0.0	53.90
Madagascar	MDG	NE	18.7	17.3	NE	1.1	77.00
Malawi	MWI	NW	0.0	30.8	-	0.8	-
Mali	MLI	NW	0.1	15.2	-	1.3	-
Mauritania	MRT	SE	68.5	9.8	NW	0.7	58.90

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Mozambique	MOZ	NE	62.5	21.6	-	0.2	-
Niger	NER	SW	1.8	4.7	NW	0.2	66.00
Rwanda	RWA	SW	0.1	8.3	-	0.1	-
Senegal	SEN	NE	60.4	44.8	NE	1.3	40.40
Sierra Leone	SLE	NE	67.9	63.1	NE	1.1	76.00
Tanzania, United Rep	TZA	NE	10.8	29.9	NW	0.5	49.70
Uganda	UGA	NW	10.0	37.6	NW	0.5	48.20
Zambia	ZMB	NW	0.9	22.5	NW	0.5	74.90
Africa: Non-PRSP States							
Algeria	DZA	SE	11.4	6.2	NW	0.3	30.30
Angola	AGO	NE	81.9	31.7	-	0.5	-
Botswana	BWA	SW	0.0	3.5	-	0.4	-
Burundi	BDI	NW	0.4	19.2	-	0.2	-
Congo, Rep.	COG	NE	11.4	45.6	-	0.9	-
Egypt	EGY	NW	0.2	20.7	NW	1.0	23.30
Eritrea	ERI	SE	58.2	7.4	-	0.8	-
Gabon	BAB	NE	71.7	35.8	-	1.5	-
Liberia	LBR	NW	0.1	31.8	-	0.4	-
Libya	LBY	SE	41.4	6.8	-	0.5	-
Morocco	MAR	NE	57.8	16.3	NW	0.9	27.20

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Namibia	NAM	SE	69.4	9.4	-	0.4	-
Nigeria	NGA	NW	0.5	36.0	NE	1.1	36.40
Somalia	SOM	SW	3.7	2.0	-	0.5	-
South Africa	ZAF	SE	10.9	8.1	-	0.1	-
Sudan	SDN	SW	0.2	1.9	-	0.2	-
Swaziland	SWZ	SW	0.8	8.4	-	0.1	-
Togo	TGO	NW	3.7	44.2	-	0.7	-
Tunisia	TUN	NE	16.7	12.0	NE	1.3	21.60
Zimbabwe	ZWE	SW	0.4	7.2	NW	0.0	62.80
Asia							
Bangladesh	BGD	NE	78.5	50.8	NE	1.9	39.80
Cambodia	KHM	NE	54.8	46.8	NE	1.1	40.10
China	CHN	NE	21.6	19.5	SE	1.6	4.60
India	IND	NE	22.1	13.2	NE	1.3	34.20
Indonesia	IDN	NE	24.3	56.4	NE	5.0	22.00
Jordan	JOR	SW	0.6	4.3	-	0.0	-
Korea, Dem People's Rep	PRK	NE	72.0	27.8	-	1.1	-
Lao PDR	LAO	NW	0.1	35.6	NW	0.6	53.00
Lebanon	LBN	SW	0.2	4.9	-	0.8	-
Malaysia	MYS	NW	5.7	37.0	SE	1.1	19.30

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Mongolia	MNG	SW	0.1	1.8	NW	0.0	33.10
Myanmar	MMR	NE	33.6	42.9	-	2.4	-
Nepal	NPL	SW	0.1	4.3	NW	0.5	44.00
Pakistan	PAK	SE	12.3	3.0	NW	0.5	36.90
Philippines	PHL	NE	20.6	40.7	NE	3.2	51.20
Sri Lanka	LKA	NE	11.8	51.8	NE	1.7	38.10
Syrian Arab Rep	SYR	SW	0.0	2.3	-	0.2	-
Thailand	THA	NE	37.5	39.5	SW	0.9	15.50
Viet Nam	VNM	NE	40.3	33.8	NE	2.4	57.20
Yemen	YEM	NE	37.4	17.3	SW	0.2	19.20
Transition Economies							
Albania	ALB	SE	18.9	2.1	NW	0.1	28.90
Armenia	ARM	SW	0.7	0.5	-	0.0	-
Azerbaijan	AZE	SW	0.5	1.0	-	0.0	-
Belarus	BLR	SW	3.4	4.0	-	0.1	-
Bulgaria	BUL	SW	1.5	2.8	-	0.0	-
Czech Rep	CZE	SW	2.0	4.8	-	0.0	-
Estonia	EST	NE	23.4	13.8	SW	0.0	14.70
Georgia	GEO	SW	0.5	1.7	SW	0.1	9.90
Hungary	HUN	SW	0.3	2.2	-	0.0	-

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Kazakhstan	KAZ	SW	1.7	1.5	NW	0.2	39.00
Kyrgyzstan	KGZ	-	-	0.3	NW	0.0	64.50
Latvia	LVA	NE	18.7	12.1	-	0.0	-
Lithuania	LTU	NW	7.1	12.1	-	0.0	-
Macedonia, FYR	MKD	SW	0.2	4.6	-	0.9	-
Moldova	MDA	SW	1.6	4.2	NW	0.0	26.70
Poland	POL	NW	9.2	11.1	-	0.0	-
Romania	ROM	SW	0.8	1.7	NW	0.8	27.90
Russian Federation	RUS	NE	56.3	14.3	-	0.4	-
Slovakia	SVK	SW	0.4	5.6	-	0.0	-
Slovenia	SVN	SW	2.0	3.4	-	0.1	-
Turkmenistan	TKM	SW	0.3	2.0	-	0.0	-
Ukraine	UKR	NW	2.4	11.7	-	0.5	-
Uzbekistan	UZB	SW	0.0	0.4	-	0.0	-
Small Island Developing States							
Belize	BLZ	NE	18.8	60.5	-	2.4	-
Cape Verde	CPV	NE	76.8	29.2	-	7.7	-
Cuba	CUB	NE	11.1	16.5	-	0.2	-
Dominican Republic	DOM	NW	0.2	12.3	NW	0.3	29.80
Fiji	FJI	NE	17.8	20.8	-	2.8	-

	Code	Trade against consumption	Fisheries exports as a percentage of agricultural exports	Fish as a percentage of average daily protein consumption	Employment against poverty	Fishers as a percentage of the economically active population	Rural poverty headcount index
Grenada	GRD	NE	10.6	16.4	-	4.2	-
Guinea-Bissau	GNB	NW	5.0	11.0	NW	0.5	60.90
Guyana	GUY	NE	23.1	44.4	-	2.1	-
Haiti	HTI	NE	11.0	10.7	NW	0.1	66.00
Jamaica	JAM	NW	3.8	21.2	-	1.8	-
Kiribati	KIR	NE	61.3	60.6	-	3.4	-
Maldives	MDV	NE	99.8	84.8	-	22.0	-
Mauritius	MUS	NE	12.9	21.9	-	1.9	-
Papua New Guinea	PNG	NE	10.0	33.6	NW	0.7	39.40
Sao Tome & Principe	STP	NE	66.1	46.5	-	5.1	-
Seychelles	SYC	NE	98.9	44.0	-	3.9	-
Solomon Islands	SLB	NE	19.1	77.4	-	4.9	-
St. Kitts & Nevis	KNA	NW	2.4	25.4	-	5.8	-
St. Lucia	LCA	NW	0.0	15.9	-	3.0	-
St. Vincent & the Grenadines	VCT	NW	2.6	13.6	-	4.9	-
Suriname	SUR	NW	6.4	24.1	-	2.3	-
Trinidad and Tobago	TTO	NW	4.4	13.4	NE	1.3	20.00
Vanuatu	VUT	NW	1.5	34.4	-	12.3	-

Annex 2

2.A The extent to which the fisheries sector is integrated into Latin American PRSPs and National Development Plans

Country	Document/Date	Criteria	Value	Remarks
Argentina	PNIP2003–5	Issue Responses	1 1	Fisheries mentioned as a productive sector whose devt. should be supported . Mention made of a project supporting sust. management of fisheries
Bolivia	PRSP/Mar2001	Links	1	Lowland indig. people at subsist. level rely on hunting and fishing
Brazil	PPA2004–7	Responses	2	Details of fishery sector projects provided in Vol.II of PPA wrt policy goal of biodiversity conservation.
Chile	PG			No mention of fisheries sector whatsoever.
Colombia	PND2002–6			No mention of fisheries sector whatsoever.
Costa Rica	PND2002–6	Issues	1	Average earnings of those in primary (inc. fishing) activities.
Ecuador	PPG2003–7	Responses	1	Support revision of import tariffs on fisheries inputs
El Salvador	PlG2001–4	Issues Responses	1 1	Need to support the devt. of regional coord. of fisheries policies. Fisheries identified within the Strategic Lines of Action, and a number of tasks identified – although not elaborated.
Guatemala	PRS			No mention of fisheries whatsoever.
Honduras	PRSP/Sept2001 (APR/Nov2002)	Links Responses	1 2	Need for norms to protect against exploit. of youth fishing underwater Increase policy activities that support s/scale fishing Devt. border towns to aid trade/service provn to support fish. devt. Integrated programme to support artisanal fishing.
Mexico	PND2001–6	Issues	1	Integrated food policy requires transfer of fisheries and aquaculture development activities to Secretaría de Ag., Ganadería y Des. Rural
Nicaragua	PRSP/July2001 (APR/Nov2002)	Responses	1	App. new Fisheries Law to satisfy reqts of Nat. Strat. for Sust. Devt Implement projects in fisheries/seafood farming to promote broad-based economic growth.
Panama	PDESF2001			No mention of fisheries sector whatsoever.
Paraguay	PG2003–8	Issues	1	Fishing can lead to species extinction.
Peru	PEN2002–6	Issues Links Responses Process	3 2 3 2	Special section of plan devoted to fisheries specific issues. Commitment to launch a Programme to stimulate public consumption of fish – particularly amongst those with limited resources. SWOT analysis includes need for improved national nutrition, although poverty issues not explicitly stressed in NSP. Policy response matrix details specific fisheries objectives, indicative measures and budgets – with emphasis on exports and growth. NSP is comprised of a series of sectoral documents, although only a limited attempt is made to "stitch" such proposals together.
Uruguay	PSN2000–4	Responses	2	Annex contains details of sectoral policies and their funding – including fisheries.
Venezuela	LGPD2001–7	Responses	1	Promise to encourage fisheries and aquaculture development.

Abbreviations: PNIP (Plan Nacional de Inversión Pública) – Argentina; PRSP (Poverty Reduction Strategy Paper) – Bolivia, Honduras and Nicaragua; PPA (Plano Plurianual) – Brazil; PG (Programa de Gobierno) – Chile and Paraguay; PND (Plan Nacional de Desarrollo) – Costa Rica, Colombia and Mexico; PPG (Plan Plurianual de Gobierno) – Ecuador; PlG (Plan de Gobierno) – El Salvador; APR (Annual Progress Report) – Honduras and Nicaragua; PRS (Poverty Reduction Strategy) – Guatemala; PDESF (Plan de Desarrollo Económico, Social Y Financiero con Inversión en Capital Humano) – Panama; PEN (Plan Estrategíco Nacional) – Peru; PSN (Presupuesto Nacional) – Uruguay; LGPD (Líneas Generales del Plan de Desarrollo Económicó y Social de la Nación) – Venezuela.

2.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for Latin America

Country	CAS/Date	Criteria	Value	Remarks
Argentina	CASPR/Oct2001	Issues Responses	2 2	Sust. Fisheries management identified as a particular area of concern Govt has taken action to curb excessive fishing of depleted hake stock. Bank programmes a Sust. Fisheries project (US$50 million in 2003) Pilot efforts made in sustainable fisheries management. Fisheries included in policy matrix. Need for continued bank involvement wrt sust. fisheries management strongly advocated during the CAS consultations
Bolivia	CASPR/May2001			No mention of fisheries sector whatsoever.
Brazil	CASPR/May2002			No mention of fisheries sector whatsoever.
Chile	CAS/Jan2002	Issues	2	Exp. diversification (signif.) into forestry, fishing, wines and fruit. Nat. resource based exports – inc. fish – sensitive to developed country demand post September 11. Ecosystem fragility in regions where fishing, mining and forestry dominate. Lack of (fisheries) regulation in the early 1990s.
Colombia	CAS/Dec2002	Links	1	Afro-Colombian fishing community included in WB *Voices of the Poor* Study.
Costa Rica	No CAS Avail.			
Ecuador	CAS/Apr2003			No mention of fisheries sector whatsoever.
El Salvador	CAS/Nov2001	Issue	1	Earthquake led to temporary diminution of fish production.
Guatemala	CASPR/May2002			No mention of fisheries sector whatsoever.
Honduras	CAS/Jan2000			No mention of fisheries sector whatsoever.
Mexico	CAS/Apr2002			No mention of fisheries sector whatsoever.
Nicaragua	No CAS Avail.			
Panama	CAS/Oct1998	Issue	1	Overexploitation of fisheries has reduced shrimp exports. Excessive levels of contamination in Bay of Panama affect fish catch.
Paraguay	No CAS Avail.			
Peru	No CAS Avail.			
Uruguay	No CAS Avail.			
Venezuela	ICAS/Nov2002			No mention of fisheries sector whatsoever.

Abbreviations: CASPR (Country Assistance Strategy Progress Report) – Argentina, Bolivia, Brazil and Guatemala; ICAS (Interim Country Assistance Strategy) – Venezuela.

2.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP) for Latin America

Country	CSP/Date	Criteria	Value	Remarks
Argentina	CSP2002–6	Issues	1	Note made of past sectoral agreements to increase reciprocal cooperation in sea fisheries. Aid broken down by sector.
		Responses	2	Detailed info. on current reciprocal fisheries agreement intentions.
Bolivia	CSP2001–6			No mention of fisheries sector whatsoever.
Brazil	CSP2001–6	Issues	1	Restrictions on FDI in fisheries sector mentioned.
		Responses	1	Intent of EU to sign a fisheries cooperation agreement with Brazil signalled.
Chile	CSP2001–6	Issues	2	Notes how trade lib. encouraged fishing activity, which now accounts for 2% of GDP, although over-exploit. is now a problem. Salmon breeding seen as important to the southern reg. economy. Aid broken down by sector (fisheries).
		Responses	1	Intent signalled to reach a bilateral fisheries cooperation agreement
Colombia	CSP2001–6			No mention of fisheries sector whatsoever.
Costa Rica	CSP2002–6	Issues	1	Fisheries is included in a trade table amongst annexes.
Ecuador	CSP2002–6	Issues	2	Coastal area dependent on fishing exports. Sharp decline in fish trade due to effects of shrimp white spot syndrome virus. Aid broken down by sector (agriculture, silviculture and fisheries)
El Salvador	CSP2002–6	Issues	1	Aid broken down by sector (agriculture, forestry and fishery).
Guatemala	CSP2002–6	Issues	1	Strategy notes that agriculture, forestry and fisheries account for 50%+ of local employment.
Honduras	CSP2002–6	Issues	1	Mention made of EU-Honduran fish trade (no figs).
Mexico	CSP2002–6	Issues	1	Mentions that all fisheries trade is covered by the EU-Mexico FTA with few exceptions.
Nicaragua	CSP2002–6			No mention of fisheries sector whatsoever.
Panama	CSP2002–6	Issues	1	Agricultural run-off noted as a threat to fishery resources.
Paraguay	CSP2001–6			No mention of fisheries sector whatsoever.
Peru	CSP2002–6	Issues	1	Dependence on fisheries (and mining) as a generator of forex noted. Impact of EU consumer protect. policy on fishmeal exports noted.
Uruguay	CSP2001–6			No mention of fisheries sector whatsoever.
Venezuela	CSP2001–6	Issues	2	Precis of sector supplied. Negative impact of new fisheries law on industrial sector discussed (consequences for EU referred to).
		Links	2	Diversification of economy via the fisheries sector will impact upon areas of high poverty and at risk of flooding. EU assistance to fisheries will help to invigorate local economy and general objective of support is to reduce poverty and improve socio-econ conditions of target population.
		Responses	3	EU Comm. pledge to help develop fisheries sector to aid diversif. via a focus on strengthening sanitary vigilance system. EU intended actions identified. Various references made to complementarity of EU support with government's fisheries policy.

Annex 3

3.1.A The extent to which the fisheries sector is integrated into the African PRSPs

Country	Document/Date	Criteria	Value	Remarks
Benin	PRSP/Dec2002	Issues	2	Large fisheries resources which have not been fully exploited. Small-scale activity, lack of controls leads to clogging of waterways and inapprop. techniques.
		Links	2	Poverty levels higher in prim. sector (inc. fisheries) than secondary.
		Responses	2	Inapprop. Fisheries (+ ag.) tools and tech. =main cause of poverty. Govt Obj. – promote emerg. of ind. fishing, sust. devt of artisanal. Fisheries Code due – June 2004 Govt support promised for infrastructure (fish ponds,reservoirs).
Burkina Faso	PRSP/May2000 (PRSPR2001)	Links	1	Food insecurity and poverty led farmers to overexploit soil and other natural resources (inc. fish-farming).
Cameroon	PRSP/Apr2003	Issues	3	Succinct and comprehensive summary (background, constraints, potential) of the sector given. Cameroon comparative advantage in ind. and art. fisheries noted and growth prospects discussed (tax reforms likely to affect sector too).
		Links	3	Document recognizes that fisheries (livestock and agric.) are crucial to wealth creation – as well as augmenting food security. Links between poverty and fisheries sector identified in
		Responses	2	participatory consultations and recommendations made. Constraints identified which impede artisanal sector and aquaculture – and detailed govt strategies for each are given. Fisheries is a component of integrated rural devt strategy proposed by govt.
		Process	2	Fishery and aquaculture actions/measures identified in implementation matrix. Fisheries communities involved in particip. assessment of poverty. Particip. approach leads to identification of ways govt could tackle poverty in fishing communities.
C.A.Republic	PRSP/Dec2000	Responses	1	Suggestion that policy responses will be based on 1999–2006 agriculture master plan (not detailed).
Chad	PRSP/June2003	Issue	1	Cont.of farming, stockbreeding and fishing to GDP, EAP, exports mentioned.
		Links	1	Suggestion that those working in primary sector (inc. fisherfolk) head the poorest households.
		Responses	1	Govt. promise to support growth of environmentally sound fishing.
Congo D.R.	IPRSP/Mar2002	Issues	1	Signals supp. for private init. in potent. growth sectors (inc. fish.)
		Responses	1	Cautions on need for prelim. evaluation before formalising strat.
C. d'Ivoire	IPRSP/Jan2002	Issue	1	Notes rural devt. strategy includes devt./diversif. in fishing.
		Links	1	High fish import dependence for national protein intakes.
		Responses	2	Govt identifies six steps necessary to develop the sector.
		Process	1	Particip. of the southern fishing communities in articulating devt. shortcomings in sector.

Country	Document/Date	Criteria	Value	Remarks
Djibouti	IPRSP/Jun2001	Responses	1	Formulate a long-term fisheries devt. prog. promised. Intent. signalled to improve fish export sanitation procedures. Allusion made to planned promotion of sport fishing. Form. of female prodn cooperatives programmed.
Ethiopia	PRSP/July2002	Responses		Fisheries briefly mentioned in context of water resources strategy. NGO comment given that PRSP ignores fisherfolk.
The Gambia	*PRSP/Ap2002* IPRSP/Oct2000	Links Responses	1 1	Allusion to average incomes being lowest in agriculture/fisheries. Govt is designing progs. to address income poverty – in case of fisheries, via action program and micro-credit.
Ghana	PRSP/Feb2003	Issue Links Responses Process	2 2 3 1	Over-exploit of marine stocks noted. Gender divide in fisheries identified (though no gender-aware fish-specific strategies detailed). Trad. fishermen (and food crop farmers) identified as very poor and reasons for their vulnerability advanced. Food security to be improved by inc. in local fish consumption. Detailed strategies supplied wrt maximising economic benefits from a rational use of fish and aquacultural resources. Govt. programmes to rehabilitate fish hatcheries included and costed in detailed policy matrix (prodn and gainful employ. theme). Emphasis on aquacultural expansion given marine overfishing. Govt pledge to offer support for organization of fisher groupings through Capacity Building Project.
Guinea	PRSP/Jan2002	Issues Links Responses Process	2 1 3 3	Fomi dam create opportunities for inland fisheries. Strategic audit of ministry responsible for fishing. Main challenges viewed as conservation and enhancement of marine/freshwater fisheries – and requisite tasks identified. Food security to be improved by inc. in local fish consumption. Govt to focus on capacity-building, raising quality standards, and diversifying/developing the highest growth activities. Four Priority Objectives (vis-à-vis fisheries) identified, tasks broken-down and costed in Policy Matrix Recogn. of profess. fisher orgs. and their role in PRSP devt process. Establish regional and national structure for info. on fish, creation of devt. admin. in the sector and dev. inland/marit. fishing villages.
Kenya	IPRSP/July2000	Response	1	Govt promise to facilitate fish marketing and processing.
Lesotho	IPRSP/Dec2000			No mention of fisheries sector whatsoever.
Madagascar	PRSP/July2003	Issues Links Responses Process	1 2 2 2	Global Objective 1 (includes) ensuring food security and opt. use of fish resources. Intent to increase fish consumption to 8 kg p.a. Est. of funding systems access. to the poor wrt fisheries credits. Govt proposes encouragement of shrimp farming (art. and industrial), develop maritime fisheries and promote inland fisheries – plus amplify health controls to ensure access to (EU) markets – license based regimes advocated for all activities. Five fisheries actions ident. under rural develop. strategic focus. Train 50 wholesale fish farmers. Harmon. of legislation to ensure respons.sustain. shrimp harvesting

Country	Document/Date	Criteria	Value	Remarks
				Capacity building in inland fisheries (including environ. decent. and inegrated CZM).
Malawi	PRSP/Apr2002 (AR2000/3)	Issue	1	Note on contribution of fisheries and forestry to GDP. Underexploit. of aquaculture and deep-sea fisheries identified.
		Links	2	Fish identified as main national protein source – although overexploit. has led to consumption decline. Environmental degradation cited as cause for poor's over-reliance on exploitation of natural resources (inc. fisheries).
		Responses	3	Detailed strategies/activities/costings for fisheries identified under the six sub-goals of the "sources of Pro-poor growth" pillar in the Action Matrix. AR documents progress to date. Intention to develop (fish) processing clusters. Recognition of female role in sector taken into account in plans proposed.
		Process	3	Intent to create Community Based Natural Resources Management groups to encourage local manag. of (fish) resources – beach village cmttees along coast.. Expansion of fisheries curricula in schools and dissem. of materials.
Mali	PRSP/May2002	Issues	1	Potential of Mopti region for devt. of fishing activity.
		Links	1	Although govt cites fisheries as a sector for devt. given high prepond. of poor, no concrete devt strategy is detailed wrt this.
		Responses	2	Specific govt objectives include devt of 30+ water bodies for
		Process	1	prodn and the equipping of women's wholesale fish trading assns. Need for fisheries-related activities in fight against poverty mentioned in participatory process.
Mauritania	PRSP/Dec2000 PRSIR/Mar02 *PRSIR/03*	Issues	2	Brief overview of historic fisheries development, regulatory change and projected sectoral growth (ind. And non-industrial fishing) trends.
		Links	1	Success of PRS depends on favourable mkt trends for fish and improved EU Agreement terms.
		Responses	3	Plans to optimize economic rent from sector via long-term (10 year) strategies for both the industrial and artisanal/coastal sectors with priority areas identified. Policy matrix identifies role of private sector and management and mainstreaming strategies (all costed) – with emphasis on growth. Creation of a Fisheries Products Export Prom. Centre promised.
Mozambique	PRSP/Apr2001 PRSIR/Au03	Issues	2	Fisheries seen an a complementary, not fundamental area of action.
		Links	1	Sust. devt. of fisheries depend. on reg. control of territ. waters.
		Responses	2	Recog. of special needs of s/s fisherman and environ. constraints. Fisheries seen as "imp. Sector" in struggle against poverty.
		Process	1	Objectives and measures outlined to support trad. and large scale nat. producers, aquaculture and qual. lab. provn and territ. control. No mention of sector in 2003 Implementation Report. Fishing communities active in document formulation – though no mention of their specific inputs.
Niger	PRSP/Jan2002 PRSR1/De03	Issues	1	Sector priorities fall under the National Water Programme.
		Responses	1	Document alludes to plan for stocking ponds and fisheries.
Rwanda	PRSP/July2002	Issues	1	Notes the need to eliminate water hyacinth as this impedes fishing. Fishing industry in Kibungo has unexploited potential.

Country	Document/Date	Criteria	Value	Remarks
				Policy Matrix promises action (unspecified) to increase fish prodn.
Senegal	PRSP/Nov2002	Issues	2	Economic growth driven (in part) by fisheries and its role recog.
		Links	1	Identifies constraints affecting fisheries development.
		Responses	3	Suggests fisheries revenues favours gps most affected by poverty.
			2	Strat. for wealth creation targets poor and so prioritizes fisheries.
		Process		Policies identified to reverse/remove constraints facing sector.
				Planned activities identified in Policy matrix (partially costed).
				Policies defined in conjunct. with players involved for all cycles of fish. Activity.
Sierra Leone	IPRSP/Jun2001	Issues	1	Inland fisheries prodn. slumped due to the crisis.
		Links	1	Govt priority is to imp. livelihood of (farm) and fishing returnees.
Tanzania	PRSP/Jan2000 PRSR1/Aug01 PRSR2/Mar03	Issues	1	PRSR1 alludes to National Fisheries Strategy (not detailed). PRSR2 notes employ. training prog. included fisheries sector.
Uganda	PRSP/Mar2000	Issues	1	PRSR1 and PRSR2 notes EU ban on Ugandan fish imports.
	PRSR1/Mar01	Responses	1	Promise of research into inc. fishing incomes once data is avail.
	PRSR2/Mar02			
	PRSR3/Mar03	Processes	1	PRSR2 notes strategic export strat. (inc. fish) under disc.
				Unavail. of fisheries inputs mentioned as constraint by particip. in consultation process.
Zambia	PRSP/Mar2002	Issues	1	Zambian basic food basket does not include meat or fish.
				Anglers and fish traders a priority group in HIV/Aids programme.
		Links	1	Wildlife (fish and game) depletion seen as a problem.
		Responses	1	Allusion made to fishing prov. nutrit./livelihoods for rural comm.
				Fisheries mentioned in context of Comm. Based Nat. Resource Management Prog.
				Costed prog. (no details) to train comm.. in fshing/bee-keeping

Abbreviations: All abbreviations in the "documents" column refer to Poverty Reduction Strategy Papers (PRSPs) with the exception of; IPRSP (Interim PRSP) – Cote d'Ivoire, Congo D.R., Djibouti, The Gambia, Kenya, Lesotho, Sierra Leone; PRSR (Poverty Reduction Strategy Progress Report) – Burkina Faso, Niger, Tanzania, Uganda; AR (Annual Review) – Malawi; PRSIR (Poverty Reduction Strategy Implementation Report) – Mauritania, Mozambique.

The Gambian PRSP, the Mauritanian Implementation Report 2003 and the Ugandan Progress Report #3 2003 were not analysed due to technical problems.

3.1.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for Africa (PRSP Countries)

Country	CAS/Date	Criteria	Value	Remarks
Benin	ICAS/Mar01	Links	1	Lagoon fishermen in South are among poorest due to overfishing.
Burkina Faso	CAS/Nov2000 CASPR/Mar03	Issues	1	Stable fisheries growth noted (CAS).
Cameroon	CASPR/Nov00			No mention of fisheries sector whatsoever.
C.A.Republic	No CAS Avail.			
Chad	CAS/May99			No mention of fisheries sector whatsoever.
Congo D.R.	TSS/Jul01	Issues	1	Notes FAO support in area of quality assurance (fishing).
Cote d'Ivoire	ICAS/May02			No mention of fisheries sector whatsoever.
Djibouti	CAS/Feb2001	Issues	1	Fisheries under-exploited due to lack of domestic demand and non-competitive labour and pricing policies.
Ethiopia	No CAS Avail.			
The Gambia	CAS/Aug1998	Responses	1	IDA project proposed to support expanded prodn. in fish and shrimp farming. Fisheries included in CAS matrix.
Ghana	CAS/Jum2000			No mention of fisheries sector whatsoever.
Guinea	CASPR/Jul01	Issues	1	Fraud discovered in issue of fishery licences.
Kenya	No CAS Avail.			
Lesotho	No CAS Avail.			
Madagascar	ICAS/Oct2002	Issues	1	Over-harvesting of shrimp attrib. to illegal licence distribution by sub-national governments.
Malawi	CAS/Aug1998 CASPR/Nov00	Issues Responses	1 1	Adverse changes in ecosystem of Lake Malawi affecting fishing. Proposed Bank project on Lake Malawi (CASPR). Problems with past WB-funded fisheries project resolved.
Mali	No CAS Avail.			
Mauritania	CAS/May02	Issues Links Responses	2 1 2	Country dependence on fisheries (and mining) stated, suggestion that fisheries value-added needs to be increased. Sectoral changes (1993–7) identified and need for improved fisheries management highlighted. Regional fisheries resource management programme noted. Credit program targeted at artisanal fisheries as part of anti-poverty programme. Fisheries projects undertaken with Bank supp. (1998–2002) noted Actions planned – with other donors – in fields of res., surveill., infrastructure, transformation and artisanal fisheries development. Fisheries included in CAS Programme Matrix.
Mozambique	CAS/Jun00	Issues	1	Imp. of fisheries (ag., mining, tourism) to GDP and exports recog.
Niger	CAS/Jan03			No mention of fisheries sector whatsoever.
Rwanda	CASPR/Jun99			No mention of fisheries sector whatsoever.
Senegal	CAS/Mar03	Issues Responses	1 1	Diagnostic Trade Int. Study (Dec2002) mentions trade barriers as impeding fisheries devt (part of PRSP Pillar 1: Wealth Creation). IFC portfolio includes one fisheries project. Notes PRSP suggests too much growth in extractive sectors of low employ. (inc. fisheries). Completion of ongoing Fisheries Sector Review (2004).
Sierra Leone	TSS/Mar02	Issues	1	Peace would allow increase capacity utilization in fisheries sector.
Tanzania	CAS/Jun00	Issues	1	Overfishing is a threat to environment.
Uganda	CAS/Dec00	Issues	1	Growth in non-traditional exports (including fish).
Zambia	CAS/Nov99	Issues	1	Note on bilateral aid granted to fisheries sector.

Abbreviations: ICAS (Interim Country Assistance Strategy) – Benin, Madagascar ; CASPR (CAS Progress Report) Burkina Faso, Cameroon, Guinea, Malawi, Rwanda,; TSS (Transitional Support Strategy) – Congo D.R., Sierra Leone

3.1.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP) for Africa

Country	CAS/Date	Criteria	Value	Remarks
Benin	2002–7	Issues	1	Fisheries mentioned in donor policy support matrix.
Burkina Faso	2001–7			No mention of fisheries sector whatsoever.
Cameroon	2001–7			No mention of fisheries sector whatsoever.
C.A. Republic	2002–7	Issues	1	Mentions fisheries in context of 1999–2006 Agric. Dev. Plan.
Chad	2001–7	Issues	1	Fisheries mentioned in donor policy support matrix.
C. d'Ivoire	No CSP			
Congo D.R.				
Djibouti	2002–7	Issues	1	Fisheries mentioned as alternative generator of revenues.
Ethiopia	2002–7			No mention of fisheries sector whatsoever.
The Gambia	2002–7	Issues	3	Size and importance of fisheries sector, concerns about overfishing and the lack of effective control over foreign activities stressed. Constraints to expansion of sector indicated, and project donors identified. No bilateral fishing protocol with EU since 1997.
		Responses	1	EU support establish. of six inter-prof. groups (inc. fish) to enhance effectiveness of rural institutions.
Ghana	2002–7	Responses	1	Government may consider negotiating an EU Fisheries Agreement.
Guinea	2002–7	Issues	3	Sep. section of CSP details size, challenges and constraints facing the sector.
		Links	2	Recogn. of sector's imp. in food security terms and regional inequities in consumpt.
Kenya	No CSP Avail.			
Lesotho	2001–7			No mention of fisheries sector whatsoever.
Madagascar	2002–7	Issues	1	Details donor support to sector (partic. EIB and aquaculture).
		Links	1	Notes first pillar of govt strategy designed to provide a fav. fisheries regime so as to benefit the poor.
		Responses	2	Detailed info. on EU Fish. Agreement and use of funds resulting. Funding of a Fisheries Surveillance Centre.
Malawi	2001–7			No mention of fisheries sector whatsoever.
Mali				
Mauritania	2001–7	Issues	2	Explicit details of government's fisheries strategy given, and recogn. of dependence (68% fishing revenues) on EU Ag. noted. Highlights high growth rates of ind. and artisanal fisheries. Support to sector highlighted in donor support matrix.
		Links	1	Notes that riches generated by ind. fishing are insuffic. to eradicate monetary poverty – and pov. redn requires more sectoral employ.
		Responses	2	Details. on EU Fisheries Agreement (past and present) given. EU commits to helping develop fish processing act. (poss. jointly).
Mozambique	2001–7	Issues	2	Fisheries trade delivers few benefits to the local population. Weak management control has led to overfishing, unlicensed fishing and smuggling and seen ext. donor support (DK) given.
Niger	2001–7			No mention of fisheries sector whatsoever.
Rwanda	2002–7			No mention of fisheries sector whatsoever.
Senegal	2002–7	Issues	3	Identification of donor support for sector, nature of projects detailed in donor matrix. Highlights importance of regulating access, surveillance and research to ensure sustainable development of sector. Government sectoral policy documents identified and the strategic objectives of government clearly enunciated (emp. though on environ rather than poverty issues).

Country	CAS/Date	Criteria	Value	Remarks
		Responses	2	Details on EU Fisheries Agreements given (past and present), also mentions artisanal fishing project (though no info. given).
Sierra Leone	2003–7	Issues	1	Notes SL lacks an official statement of fisheries policy –and resources are currently incorrectly and inadequately exploited. Past artisanal fisheries project had insuff. recognisable impact.
		Responses	1	Proposed eval. of fisheries resources and identific. of "fishing poss. that could be offered to EU' through a Fisheries Ag.
Tanzania	2001–7	Issues	1	Govt. has separate sectoral policy for fisheries.
Uganda	2002–7			No mention of fisheries sector whatsoever.
Zambia	2001–7			No mention of fisheries sector whatsoever.

The Congo D.R. and Mali CSPs were not analysed due to technical problems.

3.2.A The extent to which the fisheries sector is integrated into the African National Development Plans (Non-PRSP Countries)

Country	Document/Date	Criteria	Value	*Remarks*
Algeria	*PSRE2001–4			
Angola				
Botswana	*NDP9/2003–9			
Burundi	*CSLP1/Oct02			
Congo Rep.	*PIPC2000–2			
Egypt	*NP1997–2017			
Eq. Guinea	PNG2000	Issues	1	Mentions potential of fisheries sector (plus tourism, mining, forestry
Eritrea	*TEGPRS2001–2			
Gabon	*PEF2001			
Liberia				
Libya				
Morocco	PDES2000–4	Issues	3	While 1980s growth linked to fleet modern., 1990s overfishing of Moroccan waters linked to signing of Fishing Agreements. Detailed exposition of current problems confronting sector. Budgetary problems due to loss of EU Fish. Agreement funds noted
		Links	1	Need for social security provision for fishing sector identified – and response promised.
		Responses	3	Pledge to develop export of marine fisheries products. Planned growth in sector 2000–4 (exports, prodn, local consumption employ), along with costings for each policy proposal.
Namibia	*NDP2/2001–6			
Nigeria	*Vision 2010			
Somalia				
S. Africa	GEAR1996 SNA2003	Issues	1	Promise to make black empowerment more explicit in industries such as liquid fuels, fishing and mining.
Sudan	*NEP2001–6			
Swaziland	*NDP1999–2002			
Togo				
Tunisia	*10th Plan2002–6			
Zimbabwe				

Abbreviations: PSRE (Programme de Soutien à la Relance Economique) – Algeria; NDP (National Development Plan) – Botswana, Namibia and Swaziland; CSLP (Cadre Stratégique Lutte contra la Pauvreté) – Burundi, PIPC (Le Programme Intérimaire Post-Conflit) – Congo Rep, NP (National Plan) – Egypt; PNG (Programa Nacional de Gobernabilidad) – Equatorial Guinea; TEGPRS (Transitional Economic Growth and Poverty Reduction Strategy) – Eritrea; PEF (Programme Economique et Financier) – Gabon; PDES (Plan de Développement Economique et Social); GEAR (Growth, Employment and Redistribution) and SNA (State of the Nation Address) – South Africa; NEP (National Economic Programme) – Sudan.

Angola, Liberia, Libya, Somalia, Togo and Zimbabwe either have no one definitive national policy document or strategy – or it was impossible to identify same.

* Signifies a lack of success in obtaining same to date.

3.2.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for Africa (Non-PRSP Countries)

Country	CAS/Date	Criteria	Value	Remarks
Algeria	No CAS Avail.			
Angola	No CAS Avail.			
Botswana	No CAS Avail.			
Burundi	TSS/Feb2002			No mention of fisheries sector whatsoever.
Congo Rep.	No CAS Avail.			
Egypt	CAS/Jun2001			No mention of fisheries sector whatsoever.
Eq. Guinea	No CAS Avail.			
Eritrea	No CAS Avail.			
Gabon	No CAS Avail.			
Liberia	No CAS Avail.			
Libya	No CAS Avail.			
Morocco	CAS/May2001	Issues Responses	1 1	Notes FAO prog. to fund emerg. equip. for fishermen (and farmrs). Pilot fisheries development programme funded to test new approaches to promote small-scale fishing (1999), no details.
Namibia	No CAS Avail.			
Nigeria	ISU/Feb2002			No mention of fisheries sector whatsoever.
Somalia	No CAS Avail.			
S. Africa	CAS/May1999	Issues	1	Notes Norwegian aid to fisheries sector in donor support matrix.
Sudan	No CAS Avail.			
Swaziland	No CAS Avail.			
Togo	CASPR/Jun00			No mention of fisheries sector whatsoever.
Tunisia	CAS/Mar2000	Issues	1	Fishery ports now all privatized.
Zimbabwe	No CAS Avail.			

Abbreviations: TSS (Transitional Support Strategy) – Burundi; ISU (Interim Strategy Update) – Nigeria; CASPR (CAS- Progress Report).

3.2.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP) for Africa (Non-PRSP Countries)

Country	CSP Per.	Criteria	Value	Remarks
Algeria	2002–6	Issues	1	Notes govt. economic programme is focussed (amongst other things) on sustainable fisheries development.
Angola	2002–7	Issues	1	Signif. increase in catches and internal fish distn. (2001), but growth constrained by diffs. in preserving and marketing fish in the interior.
		Links	1	Imp. of "sound" fisheries dev. vis-à-vis food security and employ opps noted.
		Responses	1	EU-Angola Fisheries Agreement targets surplus marine resources which Angola cannot harvest.
Botswana	2002–7			No mention of fisheries sector whatsoever.
Burundi	2003–7			No mention of fisheries sector whatsoever.
Congo Rep.	2002–7	Issues	1	Allusion to the vast unexplored potential of fisheries. Tax policy currently penalizes fisheries trade potential. Mentions improvements in Congolese sanitary procedures which allows it to satisfy EU regulations.
Egypt	2002–6			No mention of fisheries sector whatsoever.
Eq. Guinea	2002–7	Issues	2	Details (briefly) government proposals vis-à-vis the sector. EU-Guinea Fisheries Protocols and their contents discussed.
Eritrea	2002–7	Issues	1	Transport policy intends to facilitate mkting of exp-oriented sectors (inc. fish). Fisheries sector only 15–20% exploited. External support for sector noted in donor matrix.
		Links	1	Food security strategy based on exploiting high-value fish exports and supporting the fisheries sector.
		Responses	1	Funds promised for improving sanitary controls for fish exports.
Gabon	2001–7	Issues	1	Intent signalled to diversify away from petroleum and into fish, forestry and tourism etc.
		Responses	2	Details and objectives of EU Fisheries Ag. outlined.
Liberia	No CSP			
Libya	No CSP			
Morocco	2002–6	Issues	2	Mentions imp. of sector and costs/objectives of the Five Year Plan. Donor support to sector identified. Notes past EU Fisheries Agreements and present suspension thereof.
Namibia	2002–7	Issues	2	Fish accounts for almost 24% exports. Donor matrix shows external support to sector. Fisheries sector benefits under Lomé, but no FA signed with EU.
		Links	1	Joint ventures used as a strategic tool to benefit previously marginalized Namibians.
Nigeria				
Somalia	2002–7	Issues	2	Separate sub-section identifies the great potential of fisheries.
S. Africa	2003–5	Responses	1	EPRD support offered for local fisheries surveillance measures, poss. resumption of SA–EU Fisheries Agreement talks in near future.
Sudan	2002–7	Issues	1	Fishing resources of Sud swamps considerable – but manag. needed.
Swaziland	2001–2			No mention of fisheries sector whatsoever.
Togo	No CSP			
Tunisia	2002–6	Issues	1	Briefly mentions donor support to the sector.
Zimbabwe	No CSP			

Annex 4

4.A The extent to which the fisheries sector is integrated into the Asian PRSPs and National Development Plans

Country	Document/Date	Criteria	Value	Remarks
Bangladesh	*IPRSP/ Jun 2003*			
Bhutan	9th Plan 2002–7	Issues	1	Catch and release fly-fishing opportunity to promote eco-tourism Rivers are under-stocked with inbreeding affecting fish quality.
		Links	1	Fresh water fisheries identified as important resource. Potential of eco-tourism in supplementing local incomes recognized.
		Responses	1	Need to establish hatcheries to re-stock rivers stressed.
Cambodia	PRSP/ Dec 2002	Issues	3	Separate sections discussing aquaculture, fisheries management and livelihood improvement, community fisheries. Also fisheries related issues raised throughout the document, incl. - State loses US$100m/yr. due to corruption, incl. illegal fishing, - Women dominate fisheries sector post-catch to marketing (75%). - Natural res. depletion (fish) increases conflicts among user groups. - Inappr. govt. market interventions hinder fisheries devt.– change of corp. culture needed to build competitive, market responsive sector. - Incorporating fishing villages into eco-tourism strategy would help to supplement local incomes
		Links	2	Fisheries are a key area for securing rural livelihoods with implications for other aspects of poverty. 1993–2001 agric. accounted for 46.4% of GDP, 30% thereof fisheries. Sharp increases in trade, incl. fish, over past decade noted- imp. of agri-exports for pov. reduct. recognized. Natural resource destruction aggravates the situation of the poor. Constrained access to natural (fishery-related) resources results in increased food insecurity for growing number of families. Fish accounts for 30% of national animal protein intake, 40–60% in rural areas, 70–75% in areas close to the Tonle Sap Great Lake/ rivers etc. Larger share of fish in consumpt. expend. among the poor
		Responses	3	Two out of 9 components of Equitable Agric. Devt. are fisheries related (rice-fish farming and aquaculture; comm.-based fisheries mgmt.)– components and implementation strategies detailed– govt. measures identified and costed and monitoring indicators defined in implementation matrix. Includes fishing-lot reform progr. to promote resource access of poor families/ communities. Industr. policy to promote processing industries for exist. natural resources, incl. fish. Some progress in reforming natural resource management (incl. fisheries) – one of 8 priority areas of Governance Action Plan (GAP) Advances made in tackling corruption in fisheries. Trade related sector studies incl. freshwater fisheries published. Impl. matrix incl. gender specific ext. programmes to take account of dominant role of women in traditional farming, fishing and marketing
		Process	2	Specific data on fishing communities derived from Household Socio–Economic Survey in Fishing Communities 1995–6 Poor reps. of fisheries sector participated in PRSP workshops. Intended change to co-management of fishery resources includes empowerment of local people.
China	*10th FYP 2001-5			
India	10th FYP 2002–7	Issues	1	Decade of growth in fishery sector (6% p.a.)/ aquaculture (10–12%) Agric./fisheries prod. incr. needed to meet nutrit. needs of popul. Quality and safety aspects of agric./fisheries products are important. Analysis of port facilities, incl. fishing ports. Port devt. projects to address environ. issues, incl. impact on fisheries and fishermen.
		Links	1	Agric. and allied sectors (fisheries) imp. for improv. econ. sit., health, nutrition of rural masses. High employment potential of fisheries good for improving living-standards, but growth slowed in 1990s. Scheduled Castes (SCs)/ Other Backward Classes (OBCs)– the worst

Country	Document/Date	Criteria	Value	Remarks
				off in socio-econ. terms- are agric. labourers, fishermen etc.
		Responses	2	Refs. to fisheries scattered throughout the doc., incl.: - Diversif. of land-based activities, e.g into aquaculture, to be encour. in "backward regions". Poss. finan. supp. to proj. using waterlogged lands for aquaculture. Fishing rights for ponds pref. given to self-help groups of landless, to promote alternative sources of livelihood. - Possibility to develop welfare funds for fish processing workers - Measures to promote export avenues for agric., fisheries promised. - Third priority of agric. devt. is research/ dissemin. of agric. technol., focus on devt. of marine fish resources/ deep-sea fishing (harvest/ post-harvest techn, fish products), bio-technology (incl. gen. engineered fishes, selective breeding), immuno-pathological research, sustainability. Research instit., incl. National Bureau of Fish Genetic Resources (NBFGR) to be strengthened. - Schemes for fish processing devt. Are being implemented.
Indonesia	*PPPN 2002–4			
Jordan	*SETP Vision 2020			No mention of fisheries sector whatsoever
Korea DPR				
Lao PDR	IPRSP/ Mar 2001	Responses	1	Agricultural devt. policy oriented towards achieving household/ community food security by diversifying rural livelihood approaches with, inter alia, increased fisheries production (refl. in policy matrix).
		Process	1	National women's/ youth org. assigned key role in promoting income-generating/ prod. activities amongst women (incl. fish ponds) and devt. of skills amongst youths (incl. cross fish breeding).
Lebanon	*FYDP 2000–4			
Malaysia	8th MP 2001–5	Issues	2	Ch. on Agric. Devt. cont. several sep. para. outlining progress of fishery sub-sector, aquaculture devt., fisheries prospects; Tables on Agric. value added, Agric. production, Self-suffic. level of food comm., Food exports/imports (all sep. figs for fisheries). Code of Conduct for Responsible Fisheries (FAO, 1997) promoted.
		Responses	2	Chap. on Agric. Devt. cont. sep. para. outlining measures to promote fisheries prod., aquaculture, ornamental fish rearing, incl. diversification of smallholder/farmer activity, into aquaculture, prov. of basic phys. infrastr. (fishery complexes). Chap. on Environment contains sep para. on planned interv. wrt. management of coastal and marine resources. Restructuring of Agric. Agencies (incl. Dept. of Fisheries) announced. R&D in fisheries to emphasize genetic improvement, product devt., new culture systems (open/ deep-sea cage culture), water treatment. Food processing ind. (incl. fish) and other processing of aquatic-based organisms to be promoted. Integr. of sport fishing into tourism packages envisaged. Table on Devt. Alloc. for Agric. (incl. fisheries).
Mongolia	PRSP/ Sep 2003	Links	1	Table detailing devt. of adult foodstuff consumption since 1990. All food-stuff (except meat and milk) consistently below recommended level. Figures shown for fish/ fish products part. low.
		Responses	1	Implement. matrix signals need for cooperation with other countries to increase supply of fish and fish products to meet domestic demand.
Myanmar				
Nepal	PRSP/ Oct 2003			No mention of fisheries sector whatsoever.
Oman	6th FYDP 2001–5	Issues	3	Recog. of sectors econ. potential – proj. growth of 5.6% p.a. till 2020. Det. eval. of fisheries perform. against obj., approved policies and mechanisms, and Investment programme of 1996–2000 Devt Plan.
		Responses	3	Identification of challenges facing traditional and commercial sectors. Objectives, policies and mechanisms and investment programme of Sixth FYDP clearly identified and costed.
Pakistan	IPRSP/ Nov 2001	Link	1	Potential of govt. action (prov. of inputs) aimed at promoting fisheries in generating add. income and employment for the poor.

Country	Document/Date	Criteria	Value	Remarks
Philippines	MTDP 2001–4	Issues	3	Two chapters detailing (i) the state, challenges of, and devt. strategies for, agric./fisheries sector, and (ii) environ. related issues and responses, incl. vis-à-vis fishery resources.
		Links	2	Maj. of poor live in rural area (77%), engage in subsist. farming and fishing. Rural incomes not diversified. Present rural devt. insufficient to sustain employment and income growth in agric. and fisheries. Environ. degradation contributes to low agr./fisheries prod. resulting in low incomes and high poverty. Unfavour. econ. conditions force subsist. farmers and fishers to adopt destructive resource practices.
		Responses	3	Detailed strategy for agric. and fishery devt. Set out in Agric./ Fisheries chapter, including descript. of Agricultural and Fisheries Modernization Act (AFMA, 1997). Devt. targets (2 scenarios) set, intervention strategies and measures identified. Environm. chapter details targets (incl. Coastal and Marine Sector), strategies and measures (incl. several fisheries related). Training/ post-training assist should target marginal. pop. sectors, incl. fisherfolk. Higher edu. instit. to be establ./ strength (Nation. Centre and Provincial Institutes of Agric./Fisheries (NCA/F; PIA/F) under National Agri. and Fisheries Edu. System (NAFES).
		Process	2	Fisheries sector reps. participated in MTDP drafting process. AFMA mandates stakeholder particip. in identif. of Strategic Agric. and Fisheries Devt Zones (SAFDZS) and SAFDZ devt plans. MTDP identifies measures to promote stakeholder participation in natural resources management (only one fisheries specific).
Qatar				
Sri Lanka	PRSP/ Dec 2002	Issues	2	War had adverse effects on fisheries (excl. from prod. fishing zones, transport, access to markets, expensive inputs, displacement) but output in north has begun to recover. Severe erosion of coast affects thousands of fishing families.
		Links	2	Coastal fishing comm. amongst the poorest in the rural sector, suffering from social excl. (poor integr., access to social services). Vulnerability of maj. of rural pop. (incl. fishermen): moving in and out of pov. acc. to season/ climate/ other ext. factors (market prices). Potent. role of growth in agric. (incl. fisheries) for pov. Red. stressed.
		Responses	2	Fisheries policy based on National Fisheries Development Program and Coastal Zone Management Program (CZMP). Key strategies pursued include prov. of inputs/technologies, infrastructure devt., state sector reform and private sector partnerships, aquaculture devt. and community hatcheries, commercialization and export prom. (yet lack of fully articulated expenditure framework). Coastal Preserv.: Series of measures to tackle coastal erosion incl. ban on use of coral reef lime, coastal repairs and protect. structures, prom. of community based resource management, reform/ amendments to regulatory/ institutional environment (Coastal Conservation Action, Fisheries Aquatic Resource Act, CZMP). Spec. targeted interventions to bring poor/ soc. excl. groups (incl. fishermen) into econ. mainstream (housing programmes, infrastr. devt., Promotion of self-employment among poor fisher-women). Reconstruction effort includes issuing of inputs (incl. fishing nets, boats) to fishermen, rehab. of fish harbours and cooling plants.
		Process	3	Section details measures to enable and foster wide-ranging and effective community participation in management of maritime resources and coastal preservation. Also included in action matrix.
Syrian Arab Rep.				
Thailand	9th NESDP 2002–6	Issues	1	Unsustainable exploit. of environ. resources, incl. fisheries and coastal res., has neg. affected ecosystem balance and bio-diversity.
		Responses	1	Environ. protection meas. include amendment of laws (incl. Fishery Act B.A. 2490 (1947)) to decentralize admin. and allow for comm. particip., clear demarcation of preservation areas for endangered flora and aquatic fauna, clear zoning and protect. of local fishing areas.
		Process	2	Ch. on Natur. Resource and Env. Mngmt outlines variety of measures (incl. fisheries specific) to promote community participation.

Country	Document/Date	Criteria	Value	Remarks
Viet Nam	PRSP/ May 2002	Issues	1	Advances in transformation of agric. prod.– rapid growth of fishery and aquaculture noted.
		Links	1	Key role in econ. growth and pov. red. effort assigned to devt. of agricultural prod., fishing and aquaculture. Many poor without access to prod. enhancing services, such as fishery extension.
		Responses	2	Gov. role in promoting off-shore fishing and intensifying/ diversifying aquaculture (incl. integr. shrimp-rice, fish-rice areas) outlined (provision of infrastructure, constr. 6 national breeding/ environmental alert centers, R&D, modern. processing ind., sales, marketing, environmental protection). Support policies targeting poor families promised, incl. prod. inputs, information, extension services, training, subsidized investment, technology transfer, capacity-building in risk-management, prevention and recovery. Harnessing targeted prom. of agric. forestr. and fishery prod. to narrow material gap between ethnic groups.
Yemen	PRSP/ May 2002	Issues	2	Rapid growth of fisheries sector (9.4% p.a.) betw. 1995–2000- among the "most promising" sectors in strife for econ. Growth. Coast and marine environment threatened by lack of adeq. monitoring/ control systems, (illegal) overfishing, inappr. fishing practices, tourism devt., chemicals and waste pollution. High percentage of women working in informal sector, incl. fisheries.
		Links	1	Majority of labourers in fisheries sector are poor. Imp. of agr. and fisheries sector for the poor recognized. Environ. degrad. neg. affects livelihoods of poor fishing commun.
		Responses	3	Objective- fisheries growth of 7.8% p.a. while protecting fish stocks. Strategy, programs/ projects identified (incl. research, creation of marine control system, law and regulation revision, quality control labs., finance for inputs, infrastructure devt.) and costed. Weak/ vague on spec. pro-poor interventions- with Agric. Prod. and Fisheries Promotion Fund (APFPF) to reduce burden of rising input prices to enable benef. to continue activities and improve efficiency.
		Process	1	APFPF activities to be undertaken "in participation with community efforts". Establ. of a Union for fishermen's cooperatives planned. Intention to disseminate successful self-help initiatives of poor communities in devt. and protection of natural resources signalled.

Abbreviations:
PRSP (Poverty Reduction Strategy Paper) – Cambodia, Mongolia, Nepal, Sri Lanka, Viet Nam, Yemen
IPRSP (Interim PRSP) – Bangladesh, Lao PDR, Pakistan
NESDP (National Economic and Social Development Plan) – Thailand
FYP (Five Year Plan) – China, India
FYDP (Five Year Development Plan) – Lebanon, Oman
MTDP (Medium Term Development Plan) – Philippines
MP (Malaysia Plan) – Malaysia
SETP (Social Economic and Transformation Program) – Jordan
PPPN (Propenas, program pemangunan nasional) – Indonesia

- Bangladeshi IPRSP was not analysed due to technical problems.
- Korea DPR, Myanmar, Qatar and the Syrian Arab Rep. either have no comprehensive/ definitive national policy document or strategy– or it was impossible to identify same.

4.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for Asia

Country	Document/Date	Criteria	Value	Remarks
Bangladesh	CAS/ Feb 2001	Links	1	Natural resources degradation neg. affects livelihoods of nearly half of the rural poor by reducing agric., fisheries and forestry yields.
		Responses	1	Fisheries project incl. in Status of Bank Group Operations Matrix and CAS Performance Matrix.
Bhutan	CAS/ Feb 2000			No mention of fisheries sector whatsoever.
Cambodia	CAS/ Feb 2000	Issues	2	Vast maj. of econ. active men are farmers/ fishermen. Young women in border reg. migr. to work in Thail. (incl. fish-processing ind.). Rubber and fish are principal agricultural export commodities. Poor mainten. of phys. infrastr. limits access to econ. opport., e.g. in agric. and fisheries, esp. for the poorest households. National environ. action plan identifies need for sustain. mngmt. of environ. resources, incl. fisheries.
		Links	2	Common property resources (CPR) (incl. lakes, rivers) have trad. contrib. substant. to livelihoods and food security of poor rural households, acc. for up to 20% of household incomes. Yet incr. restricted access to CPR contributes to rural poverty.
China	CAS/ Jan 2003	Issues	1	Country Program Matrix mentions increased trend in introd. of higher value aquatic products as progress benchmark.
India	CAS/ Jun 2001 CASPR/ Jan 2003	Issues	1	Cost of environ. deterioration is about 6–8% of GDP, incl. fisheries.
Indonesia	CAS/ Jan 2001 CASPR/ Jul 2002	Issues	1	High cost of environ. degr.– imp. of achiev. sustain. mngmt. of "most precious resouces" (incl. fisheries and marine ecosystem) stressed.
		Responses	2	WB intervention to counter degradation in marine resources outlined in CAS Program Matrix.
Jordan	NO CAS avail.			
Korea DPR	NO CAS avail.			
Lao PDR	CAS/ Mar 1999	Issues	1	Importance of research for raising agric. and fisheries prod. Stressed.
Lebanon	NO CAS avail.			
Malaysia	NO CAS avail.			
Mongolia	NO CAS avail.			
Myanmar	NO CAS avail.			
Nepal	CAS/ Nov. 1998			No mention of fisheries sector whatsoever.
Oman	NO CAS avail.			
Pakistan	CAS/ Jun 2002	Issues	2	Sep. para. discussing devt. potential of Arabian sea vis-à-vis fisheries and linked industries.
Philippines	CAS/ Apr 2002	Issues	2	Sep. para. outl. Gov. policy wrt. Agric. and fisheries modernization Tackling adverse impacts of environ. degrad. on prod. assets (such as fishing grounds) identif. as major challenge, yet public deficit and debt have limited sope for gov. interventions in the past. ODA partn. proj. focus on, inter alia, comm.–based mgmt. of coastal resources. Donor matrix details supp. to modernis. of agric./ fisheries.
		Links	1	Maj. of poor reside in rural area– depend. on farming and fishing, but slow growth in incomes and livelihoods subj. to diverse threats.
		Responses	1	Current and planned technical assistance designed to strengthen, inter alia, Local Gov. Units and techn. agencies to protect and manage watersheds, prot. areas and fishing grounds.
Qatar	NO CAS avail.			
Sri Lanka	CASPR/ Dec 1998 CAS/ Apr 2003			No mention of fisheries sector whatsoever.
Syrian Arab Rep	NO CAS avail.			
Thailand	CAS/ Jan 2003	Issues	1	Over-harvesting reduced marine fishing yields by 90%. Urgent need to elimin. rel. harmful subsid. Need to find comm.–based solutions. Groups vulnerable to HIV/AIDS include fishermen.
Viet Nam	CAS/ Sep 2002	Issues	1	Denmark supp. restruct. of state-owned enterprise in fisheries sector
		Responses	1	Program matrix mentions some fisheries-related meas.
Yemen	CAS/ Aug 2002	Issues	2	Rapid growth of fishery exp. (19% p.a. 1994–9), 2nd larg. exp. comm., most promising sector wrt. econ. growth, alongside agric. US aid to coast guard could help enforcing fishing regulations. Most valuable species over-fished. Risk of depletion of fisheries

Country	Document/Date	Criteria	Value	Remarks
				resources calls for mngmt to stabilize stocks. Coastal mariculture and aquaculture offer higher incomes and lower risks than capture fisheries, but subst. (private) investment needed.
		Links	1	Coastal fisheries rich source of income and employ. for poor families, but risk of depletion. Rising costs of capture fisheries and falling catches lead to further impov. of small-scale fishermen.
		Responses	2	Strategy to limit deplet. of fish-stocks outlined in CAS Progr. Matrix.

Abbreviations:
CASPR (CAS Progress Report) – India, Sri Lanka

4.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP)

Country	Document/Date	Criteria	Value	Remarks
Bangladesh	2002–6	Issues	1	Flood contr. measures. block migr. paths of fish, extensive shrimp cultivation destroys arable land. Donor Support Matrix (DSM) notes current intervention areas (incl. agric./fisheries) by donor/ EU MS. Ongoing/ planned donor support (incl. in fishery devt (ADB, WFP, FAO)) takes project approach.
		Responses	1	Agric./ fisheries qualif. as "minor interv. area" in DSM.
Bhutan	2002–6			No mention of fisheries sector whatsoever.
Cambodia	2000–3	Issues	1	Fisheries contr. to GDP noted (3.2%). Depletion of fish-stocks and coastal zone deterioration cited as indic. of environ. Degradation. Agric./forest./fisheries among most imp. destin. of ext. aid 1992–8.
		Links	2	Potent. contrib. of fisheries (and livestock) in improving people's livelihoods discussed.
		Responses	3	Launching of study on fisheries sector devt. detailed and costed as one of four actions within Priority Sector 1: Support to Rural Devt. Study to assess poss. of future EC supported proj., with poss. future studies to guide project design
China	2002–6			No mention of fisheries sector whatsoever.
India	2002–6			No mention of fisheries sector whatsoever.
Indonesia	2002–6	Issues	2	Fishery/ marine environ. among the areas most affected by environ. degradation, due to poor legisl. and/or law enforcement. Neg. long-term effects of shrimp farming on mangroves and other fish noted. Past Eur. Commission aid concentr. on diversifying agr. base, incl. fisheries (1980/90s).
Jordan	2002–6			No mention of fisheries sector whatsoever.
Korea DPR	2001–4	Issue	1	Even leading imports (incl. fish) to EU from K. at very modest level
Lao PDR	2002–6	Issue	1	Section on gov. policy notes intent. to implement programmes in agric. sector, incl. fishery, to incr. food security and for poss. export.
Lebanon	2002–6			No mention of fisheries sector whatsoever.
Malaysia	2002–6	Issue	1	Open issues on the EU–Malaysia trade agenda incl. (on M. side) better market access for fisheries products.
Mongolia	2002–6			No mention of fisheries sector whatsoever.
Myanmar	NO CSP			
Nepal	NO CSP			
Oman	NO CSP			
Pakistan	2002–6			No mention of fisheries sector whatsoever.
Philippines	2002–6	Issue	1	EC and MS assistance has focused on rural devt., incl. coastal and fisheries resources management.
		Responses	1	Consol. and Expans. of the Philipp. EC Rural Devt. Progr. (CEPERD) incl. proj. supp. WESAMAR Fed. of Coops. (WFC), incl. member coops. involved in sea-weed, fish-cage prod.
Qatar	NO CSP			
Sri Lanka	2002–6	Issues	1	Donor Matrix incl. donor support to Fisheries/Health/Nutrition. ADB supports reconstruction effort (incl. fisheries) in North and East. Environmental challenges include coastal degradation.
		Links	2	Very large no. of small scale farmers in dry zone are poor– inland fishery and fish farming can supplement their incomes. Potential of such progr. to meet real nutritional needs in rural areas noted.
		Responses	3	Section details planned EU interventions in support of ADB funded Aquatic Resource Devt and Quality Improvement Project. Provision of basic resettlement packages for displaced families, incl. agric. and fishing kits, during 2002 by EC ECHO.
Syrian Arab Rep	2002–6			No mention of fisheries sector whatsoever.
Thailand	2002–6	Issue	2	Para. discusses state, trends, challenges of Thai fishery sector. Unsustain. mngmt of nat. resources caus. env. problems (mangrove deforestation for shrimp farming, aggressive fishing practices). Th. seeks re-granting of Gen. System of Prefs. (GSP) privil., esp. prepared food and fisheries prod. Para. discusses fisheries/ environ. related issues in EU– Thai trade negotiation

Viet Nam	2002–6	Issue	1	Rapid environ. degradation in recent yrs., incl. overfishing, destr. of coral reefs and mangroves, reduce yields.
		Responses	1	Several EU MS (incl. Denm. Sweden, Netherl.) support coastal zone mngmt/ fisheries sector. Intent signalled to explore poss. support to enhance environ. sustain. in prod. sectors relevant to Viet Nam-EU trade relations, e.g. fisheries.
Yemen	2002–6	Issues	1	Yemeni exports fish-products to EU– one of 48 LDCs which benefit from duty and quota-free access to EU markets, incl. fish prod. EC support to fisheries sector aimed at enhancing food security.
		Responses	2	EC aid, incl. support for Fisheries Devt. aimed at realising potent. benefits of Everything-But-Arms-Initiative. Three fisheries related EU projects (5th Fisheries Devt. Proj./ Strength. of Yemen Fishery Prod. Quality Contr. Syst./ Fisheries Monitoring and Surveillance) included and costed in project matrix.

Annex 5

5.A The extent to which the fisheries sector is integrated into Transition Economies PRSPs and National Development Plans

Country	Document/Date	Criteria	Value	Remarks
Albania	PRSP/Nov 2001 PRSPR/ Jun 2003	Issue	1	Bad fishing water resource management as cause of steadily declining fisheries production. Fishery and sustainable resource management assigned imp. role in general framework for rural sector devmt.
		Links	1	Increase in incomes from agric., forestry and fishery identified as key instrument for econ. and social dvmt. Damages to fisheries constit. obstacle to pov. red. effort.
		Responses	2	Actions aimed at improving fishery resources management (legal meas., database to monitor fish reserves, General Fishing Committee for the Mediterranean (GFCM/ FAO)) incl. in impl. matrix. Spec. support policies for the sector (e.g. facil. access to inputs/ fuel, rehab. of fishing ports), incl. in impl. matrix Promotion of aquaculture activities (incl. establishment of high-value pilot aquaculture schemes in fresh and seawaters) outlined in impl. matrix. Increase level of processing of agric./fishery products, measures proposed in implementation matrix (PRSP) and realization matrix (PRSPR).
		Process	2	Damages to fisheries identified in participatory process as factor obstructing growth and/or pov. red. Introd. of joint management of sea resources by rural comm. planned– national and regiona; fisherman associations are being set up/ promoted.
Armenia	PRSP/ Nov 2003	Issue	1	Fishing as one of three reasons for the strategic significance of Lake Sevan.
		Links	1	Fishing is most imp. income source for pop. around Lake Sevan (no spec. mention of pov.).
		Responses	1	Environmental policy will rehabilitate and protect Lake Sevan's ecosystem and promote its rational use (no specific ref. to fisheries).
Azerbaijan	PRSP/ May 2003	Issues	2	Pollution of Caspian Sea- Baku bay area biolog. dead.
		Links	2	Livelihoods of large sections of population depend on Casp. Sea (oil and fisheries). Public sector employees in agric., forestry and fishing amongst the poorest paid public servants, earning less than the absolute pov. line (US$25.8/m). Poverty aggravates environ. probl., incl. overfishing in Casp. Sea, whereas pollution of Casp Sea neg. affects living standards.
		Responses	2	Measures to protect Casp. Sea from further poll./ biomass reduction (limit. on fishing, commun. particip.) Subst. wage/salary increases for publ. employees in agric., forest. and fishing promised (2003–5). Subst. increase in expend. on econ. services, incl. fisheries, to promote econ. growth (Capital exp. and supp. programs for the poor) promised.
		Process	2	Mobilising community level resources in protecting, monitoring environment (publ. educ. on environm. issues, establ. appropr. monitoring indic. and decentr. of govt. policy direction).
Belarus				

Country	Document/Date	Criteria	Value	Remarks
Bulgaria	NEDP 2000–6 NRDP			
Czech Republic	NDP 2004–6			
Estonia	NDP 2003–6 NDPPC 2003–6	Issue	3	Separate section of the NDP prov. excellent detailed discussion of fisheries sector, incl. avail. fish-stocks, state and capacity of fishing fleet, fish processing ind., fishing ports, aquaculture. SWOT analysis incl. fisheries sector. Table/ section wrt. relationships betw. environ. objectives and devt. measures (incl. fisheries sector).
		Link	1	Fisheries imp. source of income in several coastal areas, yet limited employment opport. in sector add to insecure socio-economic situation in coastal areas. EU common agric./rural devt., and fisheries policies to be harnessed to allev. pov. and social excl. in rural areas.
		Responses	3	Need to bring all links in the fish handling chain into conform. with EU food and occup. safety, and environ. protect. requirem stressed. Five programme priorities defined, incl. Rural Dvmt. and Agriculture outlining five (out of 13) fishery-related objectives and measures (aquaculture, processing, market outlets, infrastructure, fleet-restructuring). Measures discussed in detail, costed, funding sources identified.
		Process	1	Reps. of fisheries sector assoc. involved in prep. of NDP
Georgia	PRSP/ Jun 2003	Links	1	Share of meat, fish and dairy products in food energy consumption varies across the population between 7–20%, around 10% for people living in extreme poverty.
Hungary	NDP 2004–6	Issues	2	Para. disc. situat./challenges of fisheries sector. SWAT analysis identif. obsolete fish-farm. facil. and inadeq. fish process. capacit. as weakness vis-à-vis rural devt. Modernis. of agricult. sector (incl. fisheries) essential to prevent sector from becom. burden to rest of econ.
		Responses	2	Intent. to modernize/ revitalize fisheries sector/ raise competitiveness signalled. Agric. and Rural Operational Progr. section contains para. outlining fishery rel. meas. EC Structural Funds, esp. Financial Instrument of Fisheries Guidance (FIFG) identif. as funding source.
Kazakhstan	SPD 2001–10			
Kyrgyzstan	PRSP/ Dec 2002	Issues	1	Red Book of the Republic protects inter alia 2 fish species (one was included after 1985). Favourable future for devt. of fishing in Son-Kul Lake. Potential of profitable sectors poultry breeding and fish farming recognized.
Latvia	NDP 2002–6			
Lithuania	LTEDS 2002–15	Issues	2	All components of SWOT analysis incl. fisheries related issues. Favourable natural conditions for fisheries devt. noted, yet sector needs reform/ restructuring.
		Responses	2	Strategic Goal – Create econ. productive fishery system complying with EU criteria. Fisheries policy discussed in three sub-sections: Marine fishery, Interior fishery, Fishery information system.
Macedonia, FYR	IPRSP/ Nov 2000			No mention of fisheries sector whatsoever.
Moldova	IPRSP/ Apr 2002			No mention of fisheries sector whatsoever.
Poland	NDP 2004–6 SOPFFP 2004–6			
Romania	GP 2001–4	Responses	1	Promise to promote cooperative system (incl. fisheries) through adequate legislative framework. Intent. to modernis. food ind. by, inter alia, prom.

Country	Document/Date	Criteria	Value	Remarks
				diversif. foodstuffs assort.. (incl. fish products) signalled
Russian Federation	SSEPP 2000–10			
Slovakia				
Slovenia	NDP 2001–6	Issues	2	Separate section of the NDP discusses state of fisheries sector, incl. marine fishery, freshwater fishing, fish farming, fish trade). Table detail. educ. structure of labour force by sector, incl. fishery sector.
		Responses	3	Development Priority: Restructuring of Agric. and Rural Devt. incl. programme for fishery devt. containing two lines of action (i) Sustainable resource management (ii) Incr. prod. capacities for freshwater fish farming. Objectives, content and monitoring indicators detailed and overall budget establ. EC Financial Instrument for Fisheries Guidance to provide funding.
Tajikistan	PRSP/ Jun 2002			No mention of fisheries sector whatsoever.
Turkmenistan				
Ukraine	GAP 2000–4			
Uzbekistan				

Abbreviations:
PRSP (Poverty Reduction Strategy Paper) – Albania, Armenia, Azerbaijan, Georgia, Kyrgyzstan, Tajikistan
IPRSP (Interim PRSP) – Macedonia, Moldova
PRSPR (Poverty Reduction Strategy Progress Report) – Albania
NDP (National Development Plan) – Czech Republic, Estonia, Hungary, Latvia, Poland, Slovenia
NEDP (National Economic Development Plan) – Bulgaria
NRDP (National Regional Development Plan) – Bulgaria
SPD (Strategic Plan of Development) – Kazakhstan
LTEDS (Long-term Economic Development Strategy) – Lithuania
SOPFFP (Sectoral Operational Programme-Fish and Fish Processing) – Poland
GP (Governance Program) – Romania
GAP (Government Activity Programme) – Ukraine
SSEPP (Strategic Socio-Economic and Political Programme) – Russian Federation

- The Czech NDP was not analysed due to technical problems.
- Belarus, Slovakia, Turkmenistan and Uzbekistan either have no comprehensive/ definitive national policy document or strategy– or it was impossible to identify same.

5.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for Transition Economies

Country	Document/Date	Criteria		Remarks
Albania	CAS/ May 2002	Responses	3	Pilot Fishery Devt Proj. to improve fishery resources management (incl. intr. of joint mngmt practices) and increase aquaculture activities. 7 measures. identified, indicators defined and proj. costed. Agricultural Services Project, incl. measures to increase level of processing of agric./ fishery products.
Armenia	CAS/ Apr 2001	Issues	2	Since independence many environm. problems, such as depletion of fisheries resources, have aggravated considerably. Govt. has recently completed National Environ. Action Plan to address these issues.
		Links	1	Deter. socio-econ. cond. have forced many poor people to overuse Armenia's nat. res., leading, inter alia, to severe depl. of fishery res.
Azerbaijan	CAS/ Nov 1999	Issues	1	Govt. aims at revers. biodivers. loss in Casp. Sea (sturgeon hatchery)
		Responses	1	Several current and future environment-related WB activities mentioned in CAS Progr. Matrix with aim of addr. env. issues of Casp. Sea (pollution, water level, fish stocks). Project Agribusiness Sector Pre-Investment Techn. Assist. is evaluating prosp. ventures, incl. fishing/fish-products processing.
Belarus	CAS/ Feb 2002			No mention of fisheries sector whatsoever.
Bulgaria	CAS/ May 2002			No mention of fisheries sector whatsoever.
Czech Republic	NO CAS avail.			
Estonia	NO CAS avail.			
Georgia	NO CAS avail.			
Hungary	CASPR/ Apr 2002	Issue	1	Matrix on Status of H. accession negot. with EU incl. fisheries sector. Legis. in line with Common Fish. Pol. some amend. required.
Kazakhstan	NO CAS avail.			
Kyrgyzstan	CASPR/ Nov 2001			No mention of fisheries sector whatsoever.
Latvia	CAS/ Apr 2002	Issues	1	EU access. neg. advanced – 23 of 29 chap (incl. fisheries) prov. closed. EC Phare supp. to strength. fishery administration to meet requirements Common Fisheries Policy.
Lithuania	CAS/ Apr 1999			No mention of fisheries sector whatsoever.
Macedonia, FYR	JCAS/ July 1998 CAS/ Apr 1999 CASPR/ May 2000 TSS/ Aug 2001			No mention of fisheries sector whatsoever.
Moldova	CAS/ May 2002			No mention of fisheries sector whatsoever.
Poland	CAS/ Nov 2002			No mention of fisheries sector whatsoever.
Romania	CAS/ May 2001	Responses	1	EC SAPARD focus on improving processing and marketing of agric. and fishery products.
Russian Federation	CAS/ May 2002			No mention of fisheries sector whatsoever.
Slovakia	CAS/ Jan 2001			No mention of fisheries sector whatsoever.
Slovenia	CASPR/ Apr 2000	Issues	1	Matrix on Status of H. accession negotiations with EU notes that currently no further negot. are required wrt.. fisheries sector.
Tajikistan	CAS/ Feb 2003			No mention of fisheries sector whatsoever.
Turkmenistan	NO CAS avail.			
Ukraine	CAS/ Aug 2000			No mention of fisheries sector whatsoever.
Uzbekistan	CAS/ Feb 2002			No mention of fisheries sector whatsoever.

Abbreviations:

CASPR (CAS Progress Report) – Macedonia, Kyrgyzstan, Slovenia
JCAS (Joined CAS) – Macedonia
TSS (Transitional Support Strategy) – Macedonia

5.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP) for Transition Economies

Country	Document/Date	Criteria	Value	Remarks
Albania	2002–6			No mention whatsoever.
Armenia	2002–6			No mention whatsoever.
Azerbaijan	2002–6	Issues	2	Environ. probl. of Casp. Sea, wrt. fisheries resources discussed.
Belarus	NO CSP			
Bulgaria	NO CSP			
Czech Republic	NO CSP			
Estonia	NO CSP			
Georgia	2002–6			No mention whatsoever.
Hungary	NO CSP			
Kazakhstan	NO CSP			
Kyrgyzstan	NO CSP			
Latvia	NO CSP			
Lithuania	NO CSP			
Macedonia, FYR	2002–6			No mention whatsoever.
Moldova	2002–6			No mention whatsoever.
Poland	NO CSP			
Romania	NO CSP			
Russian Federation	2002–6	Issues	1	European Commission willing to give special attention. to enclave region Kaliningrad, incl. fisheries issues. Russia's rich endowm. W. nat. resources, incl. fisheries, noted.
		Responses	2	Europ. Council has authorized Comm. to negotiate Fisheries Coop. Agreement with RF. EC negotiation agenda outlined.
Slovakia	NO CSP			
Slovenia	NO CSP			
Tajikistan	NO CSP			
Turkmenistan	NO CSP			
Ukraine	2002–6			No mention whatsoever.
Uzbekistan	NO CSP			
Central Asia	RSP 2002–4			No mention whatsoever.
Eastern Europe/ Central Asia	TRCSP 2004–6	Responses	1	Measures aimed at promoting Sustainable Management of Natural Resources incl. increased level of fish stocks (esp. sturgeon and other sensitive species) among expected results.

Note: The Tacis Regional Cooperation Strategy Paper (TRCSP) complements the individual country strategy papers for Eastern Europe and the Regional Strategy Paper (RSP) for Central Asia. It outlines EC cooperation objectives and identifies three priority fields (Sustainable Management of Natural Resources, Promoting Trade and Investment, Justice and Home Affairs) as well as multi-country intervention strategies to address common challenges faced by the countries of Eastern Europe and Central Asia.

Annex 6

6.A The extent to which the fisheries sector is integrated into the Development Plans of Small Island Developing States (SIDS)

Country	Document/Date	Criteria	Value	Remarks
Antigua	NSDP2001–4			
Aruba				
Bahamas	ABC2003/4 Our Plan	Issues	1	Fisheries identified as one of the six pillars of the economy.
Bahrain				
Barbados	MTES2003–4			
Belize	NPSAP1998–2003 MTESP2002–4			
Cape Verde	IPRSP/Sep2000 PG2001–5	Issues Responses	2 2	Size of sector and importance in forex terms identified. Eight point policy programme detailed in general terms. Commitment to enhance surveill. mechanisms to reduce IUU fishing. Expansion targets for sector indicated and extens. services promised.
Comoro Is.	NRP2002–4			
Cook Is.	BPS2003/4 PDS	Issues Responses	1 1	Rapid fisheries growth in last year, though value-added low due to high import content of inputs. $2million loan from Bank of Cook Islands to fishing industry. Govt. has allocated resources to sector given potential of long-line commercial fishing (inc. harbour devt) and aquaculture. Fiscal policy amended to reduce fishing ind. (fuel/bait/equip) exempt.
Cuba				
Dominica	MTES2002–4 INDP			
Dominican R.	No Plan			
Fiji	SDP2003–5	Issues Links Responses Processes	3 1 3 1	Separate section examines size, constraints and challenges facing the marine resource sector. Fishing meets subsistence needs of 90 percent of coastal villages. Mention made of opps. for tilapia/shrimp farming and seaweed/pearl exploitation. Four policy objectives identified and 19 key performance indicators derived in Policy Matrix. Active involvement of stakeholders promised in plan formulation.
Grenada	MTES2002–4			
Guinea-Bissau	IPRSP/Sept2000	Issues Responses	1 1	Fisheries seen as a source of foreign exchange. Publication of a Fisheries Law imminent to strengthen policy so as to aid growth and fight poverty.
Guyana	PRSP/Mar2002	Issues Links Processes	1 1 1	Fishing occurs in area of Rupununi development project, but is not focus of devt plan. Sustaining income generation in fishing requires vibrant private sector in post-harvest activities in order to contribute to PRS. Allusion to tracking poverty reducing public spending in artisanal fishery/aquaculture in Annex.
Haiti				
Jamaica	MTSEF2002–4			
Kiribati	NDS2000–3			

Country	Document/Date	Criteria	Value	Remarks
Maldives	6NDP2001–5	Issues	3	Economy overdependent on fisheries and tourism. Twelve key issues identified vis-à-vis the sector.
		Links	2	Link twixt fish export redn and poverty noted, and part of govt plans to ensure devt of fishing communities.
		Responses	3	Govt plans to diversify (5 activities), increase private participation (7), manage sustainably (8) and ensure sustainable socio-economic develop of rural fishing
		Processes	3	communities (6). Intent to develop human capacity of rural communities/facilitate info. flows and incorp. active collab. of stakeholders in form. 10 Year Plan.
Marshall Is.	Vision 2018	Issues	2	Recoginition that resource rent opps. not yet fully exploited (esp. near shore fisheries), whilst exports declining over time. Imp. of aquaruim fish trade acknowledged.
		Links	1	Recognition of role of aqua/mariculture in attaining food
		Responses	2	security. Five fisheries objectives delineated. Regulations planned to conserve atoll environments. Encouragement of private sector and links with multilateral
		Processes	1	fisheries orgs. seen as crucial for development. Est. of Community Fishing Centres and trust funds.
Mauritius	BS2003/4 NSSD2001–5	Issues	1	Need to modernize fishing industry given past slow
		Responses	1	development. Broad outline of Ten Year Fisheries Development Plan noted. Adoption of ICZM programme has fishery implications. Budgetary alloc. (inc. bad weather allow.) to Fishermens Welf. Fund.
Micronesia	PF1999–2002			
Nauru	NDP2002–6			
Niue	NISP1999–03			
Palau	NMP			
Papua NG	MTDS			
St. Kitts	MTESP2000–2			
St. Lucia	IPRSAP2003	Issues	1	Commits govt. to maintenance of a productive, sustainable, small-scale fishery given social imp. of sector.
		Links	1	Notes role of Souf. Reg. Devt Found. in poverty redn via
		Processes	1	fisheries. Fisheries sector involved – and identified as a harbour of poverty – in document formulation.
St. Vincent	BA2002			
Samoa	2001/2BA SES2001/2	Issues	1	Six new vessels entering industry will aid growth. Details given as to why fishing revenues have fluct. in recent
		Responses	1	years. Funds designated for purchase of fishing aggregate devices (FADs).
São Tome Príncipe	PRSP/Ap2000	Issues	1	Sensitivity of s/s coastal fisheries to overfishing noted.
Seychelles	No Plan			
Singapore				
Solomon Is.	MTDS			
Suriname	MADP2001–5			
Tokelau				
Tonga	SDPVII2001–3			
Trinidad & Tobago	MTPF2002–4			
Tuvalu	NDS			
Vanuatu	CRP			

Abbreviations: NSDP (National Strategy Development Plan) – Antigua; ABC (Annual Budget Communication) – Bahamas; MTES (Medium Term Economic Strategy) – Barbados, Dominica and Grenada; NPSAP (National Poverty Elimination Strategy and Action Plan) and MTESP (Medium Term Economic Strategy Plan) – Belize; IPRSP (Interim Poverty Reduction Strategy Paper) – Cape Verde and Guinea Bissau; PG (Programa do Governo) – Cape Verde; RNRP (Reconstruction and National Reconciliation Programme) – Comoro Islands; BPS (Budget Policy Statement) and PSD (Principles of Strategic Development) – Cook Islands; INDP (Integrated National Development Plan) – Dominica; SDP (Strategic Development Plan) – Fiji and Tonga; PRSP (Poverty Reduction Strategy Paper) – Guyana and São Tome and Príncipe; MTSEF (Medium Term Economic and Social Framework) – Jamaica; NDS (National Development Strategy) – Kiribati and Tuvalu; NDP (National Development Plan) – Maldives and Nauru ; BS (Budget Speech) and NSSD (National Strategy for Sustainable Development) – Mauritius; PF (Planning Framework) – Micronesia; NISP (Niue Integrated Strategic Plan) – Niue; NMP (National Master Plan) – Palau; MTDS (Medium Term Development Strategy) – Papua New Guinea and the Solomon Islands; MTESP (Medium Term Economic Strategy Paper) – St Kitts and Nevis; IPRSAP (Interim Poverty Reduction Strategy and Action Plan) – St. Lucia; BA (Budget Address) – St. Vincent and Samoa; SES (Statements of Economic Strategy) – Samoa; MADP (Mullet Annual Development Plan) – Suriname; MTPF (Medium Term Policy Framework) – Trinidad and Tobago; CRP (Comprehensive Reform Programme) – Vanuatu.

6.B The extent to which the fisheries sector is integrated into the World Bank Country Assistance Strategies (CAS) for SIDS

Country	CAS/Date	Criteria	Value	Remarks
Antigua	No CAS Avail			
Aruba	No CAS Avail			
Bahamas	No CAS Avail			
Bahrain	No CAS Avail			
Barbados	No CAS Avail			
Belize	CAS/Aug00	Issues Links	1 2	Notes aquaculture (shrimp farming) as a main source of growth. While 49% of employ. for poorest quintile was provided by ag. a fishing sectors, fishing comm. not ident. as poverty-stricken grou Environ. problems emerging due to subsist fishing (and farming) increased inc. numbers of poor.
Cape Verde	CASPR/Au20 1			No mention of fisheries sector whatsoever.
Comoro Is	No CAS Avail			
Cook Is.	No CAS Avail			
Cuba	No CAS Avail			
Dominica	No CAS Avail			
Dominican R.	CAS/Ju99			No mention of fisheries sector whatsoever.
Fiji	No CAS Avail			
Grenada	No CAS Avail			
Guinea-Bissau	No CAS Avail			
Guyana	CAS/May2002			No mention of fisheries sector whatsoever.
Haiti	No CAS Avail			
Jamaica	CASPR/Se02 CAS/Nov00	Links	1	Country Program matrix notes that rural poor are fisherman (and farmers….).
Kiribati	No CAS Avail			
Maldives	CAS/Nov00	Issues Responses	3 2	Growth attributable to rich marine resources. Brief synopsis of sector – and necess. policy reforms indicated. Past Bank Projects (last closed 1997) to sector noted and weaknesses reported. Fisheries Sector report due out shortly (no details). Highlights need for supp. for community-based reef management and mech. for managing access rights to fish stocks and reefs. Future Bank strategy identified in Country Program matrix.
Marshall Is.	No CAS Avail			
Mauritius	No CAS Avail			
Micronesia	No CAS Avail			
Nauru	No CAS Avail			
Niue	No CAS Avail			
Palau	No CAS Avail			
Papua NG	CAS/Oct99	Issues	1	PNG has sustainable advantage in fisheries (mining and timber). Intention to improve monitoring of activity in fisheries dept.
St. Kitts	No CAS Avail			
St. Lucia	No CAS Avail			
St. Vincent	No CAS Avail			
Samoa	No CAS Avail			
Sao Tome Príncipe	CAS/Oct00	Responses	1	Promise that Public Resource Management Credit will be used to fund a study on the fisheries sector.
Seychelles	No CAS Avail			
Singapore	No CAS Avail			
Solomon Is.	No CAS Avail			
Suriname	No CAS Avail			
Tokelau	No CAS Avail			

Country	CAS/Date	Criteria	Value	Remarks
Tonga	No CAS Avail			
Trinidad & T.	CAS/Mar99	Responses	1	Govt. has devised progs. to supp. fisheries and a/culture (no detail). Integrated CZM to protect beaches and fisheries.
Tuvalu	No CAS Avail			
Vanuatu	No CAS Avail			

Abbreviations: CASPR (Country Assistance Strategy Progress Report) – Cape Verde.

6.C The extent to which the fisheries sector is integrated into the European Union Country Strategy Papers (CSP) for SIDS

Country	CSP Period	Criteria	Value	Remarks
Antigua	2001–7	Issues	1	Fishing activity up 60% since 1980s – and seen by govt. as sector of "most promise", although concerns too about overfishing. Donor support (Japan) for fisheries projects.
Aruba	No CSP			
Bahamas	2002–7	Issues	1	Challenge is sust. use of fragile ecosystem, including fisheries. Probs. of fish poaching, and with intro. closed fishing season by govt.
		Responses	1	Mention of imp. of EU as a market for Bahamian fish products. Identific. of niches in tourist game-fish market. EU support to improve sanitary processes in fisheries sector and to imp. local management capacities in the sector.
Bahrain	No CSP			
Barbados		Issues	2	Detailed note of govt. plans to upgrade the sector and a note of its regional fisheries body commitments.
		Responses	1	Construction of infrastructure to aid sectoral development.
Belize	2002–7	Issues	2	Fisheries cont. growing amount to GDP (1990=2%, 2000=5%), with shrimp farming/aquaculture increasing sharply. Fisheries noted vis-à-vis environmental protection requirements. EU concerns over lax Belizean regulation (flagging and sanitory controls) which hampers exports to EU.
		Links	2	Document notes and discusses 1996 survey indicating 45% of poorest quintile relied on either ag. or fishing for their livelihoods.
		Responses	1	EC response to focus on devt of rural sector (inc. aquaculture) with effective private sector particpation. Coherence between devt and other EU policies (inc. fish.) stressed.
Cape Verde	2001–7	Issues	1	Despite fleet and processing modernization, exports have fallen sharply – in part due to hygiene deficiencies.
		Links	1	Absence of continental platform limits magnitude of fish resources.
		Responses	1	Recognition of fisheries as ultimate "free" resource for the most vuln. EU fisheries revenues contrib. indirectly to aid local food security. Brief detail of EU Fisheries Agreements provided.
Comoro Is.	2002–7	Issues	1	Inapprop. fishing techniques causing environ. problems.
Cook Is.	2002–7	Links	1	Offshore fishery of limited imp., reef/lagoon fishing for subsistence.
		Responses	1	EU plans to balance its commerc. interests with local devt imperatives via EU regional programme.
Cuba	No CSP			
Dominica	2002–7	Issues	1	Notes necess. of dev. offshore pelagic resources and providing more fishing platforms.
		Links	1	Road imps. will improve market access for southern fishing villages. Link twixt sector and livelihoods clearly expounded.
Dominican R.	2001–7			No mention of fisheries whatsoever.
Fiji	No CSP			
Grenada	2001–7	Issues	2	Industry collapse 1999, govt. rebuilding with French/Jap. help. Sub-regional efforts to establish a well-diversified fisheries sector. Tourism Master Plan emp. need for cross-cutting linkages (inc. fish).

Country	CSP Period	Criteria	Value	Remarks
				Construction of additional fisheries infrastructure promised.
Guinea-Bissau	2001–7	Issues	2	Imp. of fisheries resources identified and donor programmes identified in accompanying support matrix. Infrastructural deficit a major constraint on sector's expansion.
		Responses	2	Notes govt. ag. policy intent on revis. judic.framework for fisheries. Briefly outlines past GB-EU Fisheries Agreement, whilst coherence between EU development policy, national plans and the fisheries sector clearly enunciated through recent fisheries agreement.
Guyana	2001–7	Issues	1	Mentions imp. of fishing to local economy and sharp growth in per capita fish consumption.
Haiti	No CSP			
Jamaica	2001–7	Issues	1	Notes niche ag. products – inc. aquaculture – have growth prospects.
Kiribati	2002–7	Issues	2	Licence fees and remittances from Kiribati seaman working on foreign ships major factor in GNP. Unrealized potential is recognized – as is magnitude of fish resources.
		Responses	1	EU purchase of boats for state fishing company – unsuccessful. Sector ident. for EU support measures (inc. Fisheries Agreement) and mention of need for coherence between EU interests and local needs.
Maldives		Issues	3	Fisheries potential acknowledged. Contrib. to GDP, employ and exports given, and recog. of sensitivity of tuna exports (pref. access to EU market) to price fluctuations and graduation from LDC status. Overexploitation of inshore reef resources highlighted.
		Responses	1	EU funding of a fish inspection project.
Marshall Is.	2002–7	Issues	2	Recognizes abundance of local fish resources and donor support. Details on government licensing revenues and the objectives of 1997 Nat. Fisheries Policy.
Mauritius	2001–7	Issues	2	Fishing seen as a signif. employer, though growing pollution threats due to inadequate waste water facilities – matrix traces extent to which environment has been integrated into fisheries area.
		Responses	1	Some information on EU Fisheries Agreements.
Micronesia	2002–7	Issues	2	Main fisheries revenues through access fees rather than exports. Overview of fisheries sector and resources provided. Notes Japanese million fishing aid.
Nauru	2002–7	Issues	2	Precis of sector provided – including current constraints on its growth. Aquaculture could provide incomes at "grassroots" level.
Niue	2002–7	Issues	1	Value of fisheries production and license fees. Development constrained by lack of adequate landing facilities
		Links	1	Fishing is integral to livelihoods of subsistence households.
		Responses	1	EU promises to ensure coherence between its tuna harvesting interests and national development objectives in fisheries arena.
Palau	2002–7	Issues	2	Sectoral contribution to GDP and license sales noted. Concise resume provided of fisheries sub-sectors (coral reef, pelagic and aquaculture), participants and output levels. Notes Japanese fishing aid. Fisheries and aquaculture highlighted as growth areas.
		Responses	1	Notes EU intends to develop series of bilateral fishing agreements.

Country	CSP Period	Criteria	Value	Remarks
Papua NG	2002–7	Issues Responses	1 1	Resource abundance noted, as is CDE tech. support for fish process. EU promises to ensure coherence between its tuna harvesting interests and national development objectives in fisheries arena.
St.Kitts	2001–7	Issues	2	Fisheries sector depicted as weak and traditional. Action matrix identifies govt. plans to modernize sector and ensure sectoral sustainability. Particip. in regional CRAFP programme, and Japanese aid identified.
St. Lucia	2001–7	Issues Links	3 1	Excellent sectoral summary highlights contribution to GDP, future growth prospects, current constraints and details on the STABEX funded fisheries development programme. Notes govt intent to achieve self-suffic. in fish (poultry,pork,eggs).
St. Vincent	2002–7	Issues	1	Fisheries value-added has increased, though local fish market failed recent EU inspection. Japan has funded construction of fishing facilities. Action matrix highlights govt's broad sectoral objectives (3).
Samoa	2001–7	Issues Links	2 1	Fisheries replaced agriculture as dominant export earner. Support (with Lomé funds) for fisheries micro-projects. CDE support for fish processing noted. Redn in polluting activities will protect reef fisheries. Paper notes fisheries (and ag.) are backbone of village economy, though such subsistence activities have declined in imp. over time.
São Tome Príncipe	2002–7	Issues Responses	1 2	Notes govt. intention to develop stagnant fisheries sector. Support to sector noted in both donor matrix and in prose. Details on EU Fisheries Agreements given (past and present).
Seychelles	2002–7	Issues Responses	2 3	Imp. of foreign-owned tuna and local artisanal sector detailed. Need for lagoon preservation and effective EEZ management has led to search for coherence between environ-tourism-fisheries objectives. Donor matrix identifies external support to sector. Details of current and past EU Fishing Agreements given. Hints that govt. requests could lead to EU support being given for capacity enhancement (fish. manag.) and fish processing. Notes that Fish. Ag. should help develop indigenous fishing capacity.
Singapore	NO CSP			
Solomon Is.	2002–7	Issues Links Responses	2 1 1	Fisheries exports down due to poor tuna prices and ethnic unrest. Unsustainable fishing threatens fragile reef ecosystems. Fishing rights granted to Taiwan (2001) severely undervalued. Explan. of govt. policy reforms proposed – and past policy failures. Artisanal sector imp. in rural income terms and as a protein source. Solomon's benefited under reg. Indic. Prog wrt fisheries, also funding of small rural fisheries centres.
Suriname	2001–7	Issues	1	Gold-mining is poisoning fish populations. Allusion to imp. of fishing (esp. shrimp) to national economy.
Tokelau	No CSP			
Tonga	2002–7	Issues Links	1 1	Recogn. of enormity of Tongan fish resources – and potential for a "well-negotiated fishing agreement" to help. Comp. fisheries manag. plan being drawn up with Japanese support. Acc. to fishing (and land) allows families to meet basic subsist. needs.
Trinidad & T.				

Country	CSP Period	Criteria	Value	Remarks
Tuvalu	2002–7	Issues	2	Abund. fish. resources, with dependence on sale of fishing licenses.
		Links	1	Highlights revenues from fishing agreements with US/Japan/China. Notes government's intentions vis-à-vis sector. Rural population engaged in subsist. activity (inc. fishing). Suggestion that those dependent on artisanal fishing with no alt. income source are most vulnerable. Attempts to dev. domestic fisheries beyond subsist level ineffectual.
Vanuatu				

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